ATTACHMENT 1

DATA STANDARIZATION WITHIN YORK REGION

Collaborative Strategies for Modernizing Local Municipality Development Application Processing

McCauley & Moyle, January 2023

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ACKNOWLEDGEMENTS

As noted a number of times throughout the course of 2022 ,“we love this project”!

We said from the beginning, the idea of bringing together local municipal staff to work together for the purposes of standardization and common development application practices was genius. As it turned out, the timing for the dialogue was more than fortuitous.

During the evolution of this project, McCauley and Moyle have had the privilege of interacting with a number of York Region senior Planning leaders. Their sincere efforts to work with their local municipal partners, for the purposes of developing strategies to accelerate housing provision throughout the Region, has produced results.

Participation by area municipal staff has been invaluable as to creating tools and approaches that are now available for all to use as a base for common practices across York - yet unique to local requirements. Through creative collaboration and sharing of experiences, these professionals have formed what could be a first in Ontario regional methodology for advanced development application processing.

Adding to the value of the work, would be the external agency representatives that participated in a number of discussions such as York Region Development Engineers and Conservation Authority subject matter experts.

Members of BILD (Building Industry and Land Development) are to be commended for engaging in several meetings to assess the progress that has been made during the project and providing thoughtful feedback that has helped to hone concepts being explored.

We thank the local municipal Planning Commissioners and CAOs for expressing support and enthusiasm for the concepts behind this project. Your staff need your leadership like never before.

Maureen McCauley and Pat Moyle

A HOUSING CRISIS
Never before seen in Ontario

UNPRECENTED LEGISLATIVE CHANGES
Bills 109, 3, 23, 39

BROAD INPUT
Area municipal staff
Number of Workshops
Key external agencies
Senior municipal executives
Members of BILD

NEW APPROACHES
New development application processing
Common Terms of Reference

29 RECOMMENDATIONS
for new development application processing
27 Common Terms of Reference

EXECUTIVE SUMMARY

IT STARTED WITH A VISION

In recent years, York Region has undertaken several key projects with the intention to streamline development processing. "The Dream" as it came to be known, was to improve the development customer experience by overcoming challenges such as:

- Harmonizing a very complicated process, involving a large number of subject matter experts from different levels of government and external agencies, operating on multiple platforms
- Transitioning a largely paper based process to contemporary technologies
- Developing common terminology and communication streams to provide an "Amazon" customer experience i.e. an at any point status understanding

With a grant provided under the Provincial "Audit and Accountability" Fund, work on The Dream continued with the creation of an overarching "Data Standardization" project. The project included a number of parallel initiatives. One area of particular focus was to develop shared tools for use by all municipalities within the Region of York, specifically common study Terms of Reference (TOR) and forms.

McCauley and Moyle were retained in the first quarter of 2022 as facilitators to work with local municipal staff in an effort to work towards developing the shared tools.

THE YEAR THAT WAS

Early in 2022, housing in Ontario was declared as a crisis situation and the Provincial government proceeded to take steps to address. Goals were established, the primary one being to build 1.5 million new homes within the next 10 years.

Four key provincial Bills were introduced on an expedited timeframe throughout the year with the intention to alter municipal development processing by encouraging streamlining and standardization.

PROJECT EVOLUTION

The new legislation introduced over the course of 2022, proved to be dramatic and impactful. As a result, the objectives for the shared tools project were adjusted and expanded a number of times, to reflect where possible, the aim of each Bill..

RESULTING OUTCOMES AND RECOMMENDATIONS

Work by municipal staff, facilitated by McCauley and Moyle, resulted in the following outcomes for use by all local municipalities within the Region of York:

1) A new expedited development application process entitled the "Collaborative Application Preparation" (CAP) Process, including suggested efficiency practices
2) 27 study Terms of Reference

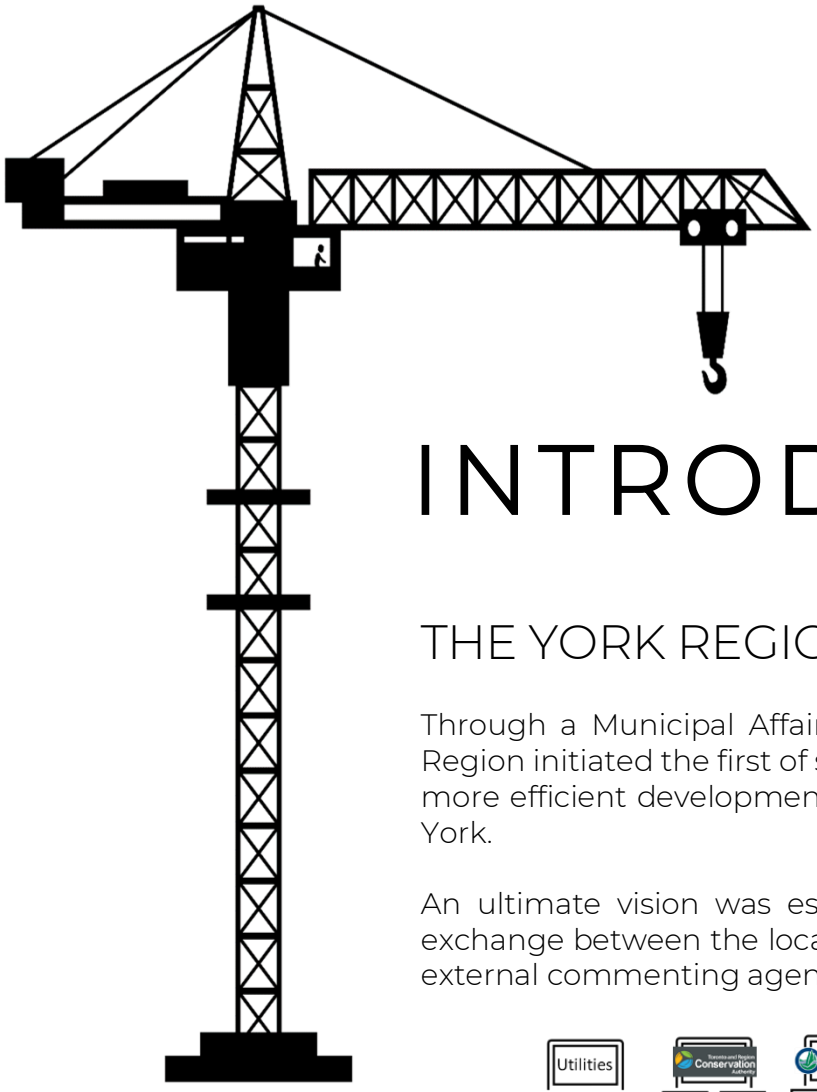
This report summarizes the work undertaken and the outcomes. In addition, the consultants have assembled the following list of 27 Recommendations for consideration by York and the local municipalities.

Priority Recommendations

1. Senior Leadership Change Management Support
2. Create a "Continuous Improvement Cooperative"
3. Pursue and Document "Certainty and Commitment"
4. Ensure Resources are in Place to Deliver on "Certainty and Commitment"
5. Maintain the Notion of the York Municipalities Union

Other Recommendations

6. Consider Several Pilot Projects to Assess "CAP"
7. Get Behind the "Efficiency Concepts"
8. Explore a Common Fee Structure
9. Clear and Comprehensive Updated Planning Documents
10. Assess the Concern 'Too Much Detail Too Early"
11. Use Checklists
12. Don't Use Checklists as "Shopping Lists"
13. Customer Service Enhancements
14. Develop Corporate Changes to Expedite Council Consideration
15. Simplified and Succinct Planning Reports
16. Adjust Public Consultation to Adhere to Planning Act Intent
17. Website Commonalities
18. Coordinate Municipal "Initial Consultation Meeting" Schedules
19. Ensure Those Invited to Comment Have Critical Input
20. Consultant Work Quality - A Pre Qualified Roster
21. Consultant Work Quality – Supportive Planning Act Changes
22. Consultant Work Quality – Explore the Concept of Rating
23. Consultant Work Quality - Relying on "The Seal"
24. Capitalizing on Reliable Engineering Consultant Work
25. Explore the Concept of Sharing Staff and/or Expertise
26. Explore the Community Planning Permit System Concept
27. Enhanced Coordination with Development Engineers
28. Lead Planner Authority
29. Keep the Momentum Going

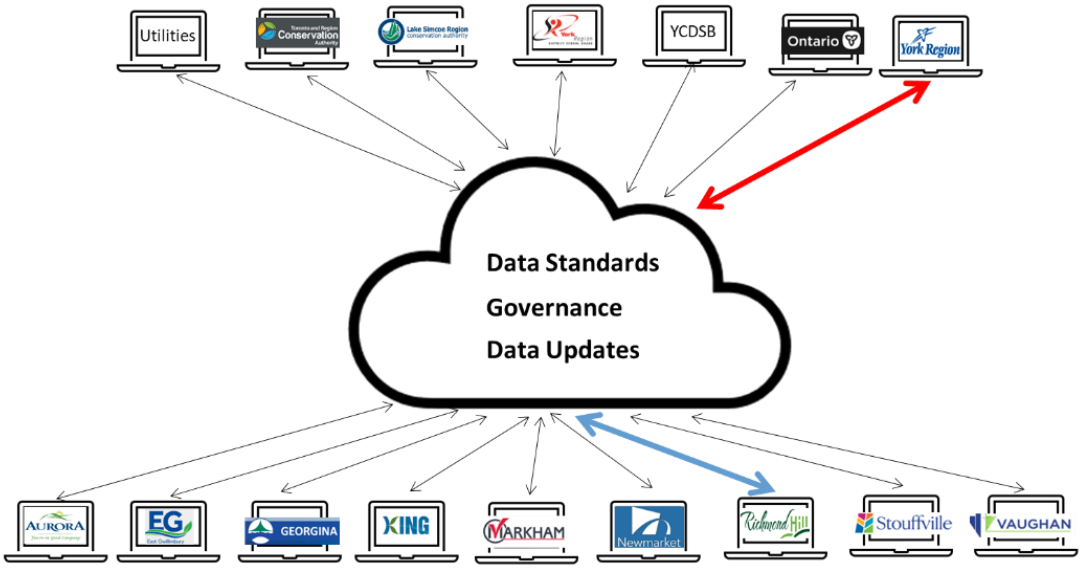


INTRODUCTION

THE YORK REGION DATA EXCHANGE VISION

Through a Municipal Affairs and Housing grant program in 2021, York Region initiated the first of several projects that were intended to support more efficient development application processing within the Region of York.

An ultimate vision was established – to work towards complete data exchange between the local municipalities, the Region of York and other external commenting agencies.



A backbone of the initiative was data standardization. Without standards there is a lack of transparency across the entire development approval process. By establishing uniform terminology, common forms, and standard practices a vision to eventually move to digital communication and information sharing could be accomplished.

In order to achieve the vision, initial objectives such as the following were established to benefit both York and its area municipalities:

- Develop Common Planning Data Standards
- Determine Common Process and Toolbox
- Enhance Internal Processes
- Boost Cross-Organization Data Exchange
- Increase Transparency and Data Quality
- Improve the Customer Experience

THIS PROJECT IS INITIATED

The objectives identified to work towards the York data exchange vision were further refined in the Data Standardization project which was established in February 2022.

The primary intention of the project was to define consistency and look for common approaches that would establish the first level of data communication.

The initial focus included working on a common Digital Application Form, a common Pre-Consultation Form and Standardized Study Terms of Reference – all of which would be used by local municipalities and the Region.

These materials would be developed collectively by Planning representatives from all 10 municipalities with consultation from the development industry to incorporate the customer perspective.

The aim of the project included:

- improving the customer experience
- increasing transparency and data quality
- quality development application submissions

And for the purposes of the York data exchange vision, to set the stage for the design of a future interactive portal that would someday allow real time application status tracking for applicants.

2022 IMPACTFUL LEGISLATION

In late 2021, the Provincial government appointed the Ontario Housing Affordability Task Force which provided a series of recommendations to increase the supply of housing. The task force concluded among other things that supply of new housing was a major issue and suggested that given immigration levels, and current affordability issues 1.5 million new residential units over a 10 year period was required to address the supply shortage.

The government chose to accept this along with several other recommendations and set out to create an ambitious legislative agenda. The immediate result were two Bills which were quickly approved in 2022

The first Bill was Bill 109, *The More Homes for Everyone Act, 2022* which received Royal assent, just two weeks after it was introduced by the provincial government on March, 2022.

The most notable amendments to the Planning Act included:

- Requiring Municipalities to refund zoning bylaw application and site plan fees were no decision is made during the statutory timeframe.
- The creation of a new ministerial zoning tool, known as the Community Infrastructure and Housing Accelerator.
- An established review process for community benefit charges.
- Amendments to certain parkland requirements
- Providing the Minister with new powers regarding certain OPAs and new OPs
- Permitting the Minister to create regulations for the use of surety bonds rather than letters of credit for conditions imposed by a municipality on planning approvals

The first amendment noted above has created the most tension for the local municipalities in York. i.e.

	No Refund	Half off 50% Refund	Super Discount 75% Refund	Free Service 100% Refund
ZBA	Decision within 90 days	Decision between 90 and 150 days	Decision between 150 and 210 days	Decision after 210 days
OPA/ZBA combined 34 (11.0.0.0.1)	Decision within 120 days	Decision between 120 and 180 days	Decision between 180 and 240 days	Decision after 250 days
SP	Decision within 60 days	Decision between 60 and 90 days	Decision between 90 and 120 days	Decision after 120 days

The legislative frames were extremely challenging for a number of reasons. A municipality is required by legislation to circulate zoning, some site plan and OP amendments to a variety of external agencies with little or no control over responses and timing thereof.

Provincial Ministries for example are required to submit comments but have previously been challenged to respond in the timeframes now set out in Bill 109. Other special purpose bodies are also given notice and depending upon the complexity and time of year when an application is made, will find it very difficult to review an application within its mandate in the new time frames.

Public engagement is a requirement in most planning applications and proper notice, scheduling of meetings and hearings with the resulting analysis and planning recommendations take time.

Finally the internal decision making process of municipalities relies on the giving of notice, the analysis of all of the agency and departmental comments which result in a recommendation to approve or deny a rezoning or Official Plan Amendment typically by a planning committee of Council. That recommendation is then brought forward to Council for a final decision, often several weeks after the Committee consideration.

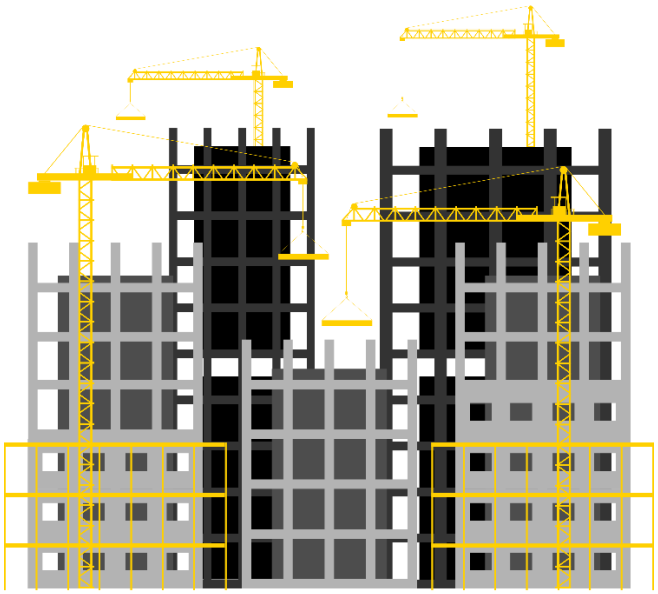
Unfortunately Bill 109 does not permit the "stopping of the clock" during the mandated timeframes, even if it is the logical and appropriate thing to do.

Bill 109 was to come into force and effect on January 1st, 2023. While the legislation has not been amended, the Minister notified AMO and the City of Toronto of his intent to delay the implementation of the Bill until July 1st, 2023.

The second Bill has also had a major impact on the project, and more importantly York Region and local municipalities, that being Bill 23, *The More Homes Built Faster Act, 2022*. This omnibus legislation contains significant implications in Regional settings, particularly with the downloading of regional planning responsibilities to the local municipalities, and the downloading of environmental reviews previously provided by Conservation Authorities (CAs).

Prior to the Bill, CAs and municipalities had Memorandums of Understanding (MOUs) with Conservation Authorities to provide certain planning review services including; habitat and endangered species, significant woodlands, wildlife habitat, fish habitat, Environmentally Significant Areas (ESA), surface water features, groundwater features, water resource systems, natural heritage areas, storm water management water balances and any other matters set out in the MOU. Much of this work is done by Conservation Authority water resource engineers, ecologists and environmental planners.

In order to meet the legislative timeframes of Bill 109, York municipalities will have to quickly find a way to replace the services which were previously provided by the two Conservation Authorities in York Region.



A NEW ERA

IT BECAME OBVIOUS

From the many provincial statements and quotes in the media, that accompanied the various announcements of Bills 109, 3, 23 and 39 over the course of 2022, it was obvious that the government of Ontario was intent on major change. By some descriptions, disruptive change.

The sweeping changes to land-use planning provincewide were obviously meant to instigate a significant transformation in the way in which municipalities managed development within their boundaries.

As such it became clear that a new era of development application processing was required for York municipalities to continue their contribution to housing supply – under new terms.

It was soon realized that this was not a situation for "tweaking", but rather a substantive new way of doing business.

In turn, the project took on a new imperative.

Given the momentum established in early days and the talent already assembled to participate, this project was in a position to pivot immediately to begin to address the objectives and targets alluded to within the various legislations.

PROJECT REPRIORITIZATION

With the newly established and challenging deadlines for application approval/decision, a shift in attention was required – beyond creating standardized materials to support development applications to a review of the process itself.

As the first strategy, it was quickly recognized that creating a more fulsome upfront assessment of the project would be of great benefit. By taking more time in an initial consultation process, to understand the details of the pending application, direction for complete submission could be more specific. Improved quality for complete submissions could in turn lead to improved processing timeframes.

Hence the project deliverables became focused on developing;

1) a new framework for development application processing
2) techniques for efficiencies and supporting forms
3) common Terms of Reference for studies

All with the intention to develop consistent strategies for common utilization by all York municipalities, as a means to manage the impacts of the new legislation.

1

"We need to support efficient local decision-making to help cut through red tape and speed up development timelines"

Bill 109 is a "first step" to the Ontario Housing Affordability Report

"The province is actively deepening our cooperation on all fronts across all municipalities to get 1.5 million homes built over the next 10 years"

"empower municipal leaders to work more effectively with the province to reduce timelines for development, standardize processes and address local barriers to increasing the supply of housing,"

PROJECT PRINCIPLES AND OBJECTIVES

To a large extent the principles and objectives for the project did not change dramatically in light of the legislation cascade over 2022.

However, the reasons behind each took on greater meaning.

Foundational Principles:

- Collaboration – create a process base for like minded municipality and applicant cooperation that is focused on mutual targets
- Correct Start – taking time to invest in developing a "good footing" for projects with a well defined understanding of objectives and how to get there in an expeditious manner
- Clarity – ensuring municipal expectations for required information are clear and complete upfront
- Certainty – providing applicants with an assured path and timeframe to approvals
- Conciseness – seeking succinct information requirements – only what is necessary information for planning decision making purposes
- Commitment – a dedicated effort to 1) identify deadlines and 2) meet deadlines
- Customer Service - Customer service is defined as the support you offer your customers – in this instance finding ways to assist development customers in being successful. .
- Change Management – corporate backing for staff working in "the new Era" . Recognizing that assistance will be required to support staff from transitioning to current practices to new ways of doing business.
- Continuous Improvement – recognizing that the work to transform development application processing - to meet the expectations identified through the new legislation – has only begun

Objectives:

Design a modernized development application process that will;

- endorse the concept of "MVP" - Minimum Viable Product i.e. what is the minimal information required to make appropriate decisions
- seek ways for "simplification"
- invest the time up front for project initiation that will set the stage for success i.e. More work up front = quality submissions = faster processing time
- support the applicant in making a successful Complete Submission, within a reasonable timeframe
- integrate the "customer experience" in new process methodologies
- establish clear requirements and comprehensive expectations
- rely on clear and concise study Terms of Reference. And where possible, reduce the need for peer reviews
- Incorporate flexibility for local municipal tailoring

INVOLVEMENT

A complicated process such as development application processing, involves a lot of people, a lot of expertise and a lot of perspectives.

As such a project that attempts to address progressive changes to the process must involve a lot of people, expertise and various perspectives. In this case, with the added challenge to develop common practices for multiple municipalities. And during a time of changing criteria.

The work on this project took place over a number of months, involving a number of municipal representatives within and across the Region, as well as external commenting agency and development industry participants (a full listing of names is included in the Appendix).

A COLLABORATIVE WORKING GROUP

A core group of Planning representatives from each of the local municipalities had been assembled by the Region in early days to work towards Planning Data Standards and subsequently this project.

As the analysis of possibilities expanded, a number of Development Engineers were added to the group.

For the same reason, eventually representatives from the two Conservation Authorities serving the lands within York Region became active members of the group,

In total, the Working Group met for 10 working sessions providing thoughtful input and direction.

For several meetings of the Working Group, a municipal lawyer attended to provide information to contribute to the conversation.

ENGAGEMENT WITH SENIOR LEADERS

In light of the substantive changes at hand, it was essential that senior management provide their feedback and encouragement for the project.

In particular, this project was the subject of a number of separate meetings or an added Agenda item for standing meetings. The point being, to discuss the concepts and proposals for new development application procedures, efficiency concepts and common approaches that the ongoing analysis of the Working Group was generating.

These meetings included:

- Local Municipal Planning Commissioners
- Regional Planning Commissioner/Director Meetings
- The York Region Steering Committee
- York Region area Municipal CAOs

These meetings were key in confirming direction and support for the intended project deliverables and guidance in light of the changing legislation.

BILD INPUT

Consultation with members of the Development Industry was identified as a priority in the project scope of work. York Region established contact with senior staff members of BILD early in the year to keep them apprised of the project and to invite them to participate when results would be available.

In September BILD issued their report entitled "*Greater Toronto Area Municipal Benchmarking Study*". The purpose of the study was to investigate factors that could be contribute to housing affordability issues in major housing markets across the Greater Toronto Area,

The content of the report revealed many points that aligned with the position of York municipalities and objectives of the project.

During late summer, as the common Terms of Reference were under review, a survey seeking input from members of BILD was created.

In the fall of 2022, two key meetings were arranged with members of BILD to provide an overview of the process changes and other concepts. A third meeting in early 2023 was also booked to further the exchange.

> *"some municipalities still do not make important features of the process transparently available, such as application requirements, terms of references for technical studies, or other key planning documents available to applicants, which can hinder the quality of submissions received, and can indirectly impact municipal review timelines"*
>
> BILD Report, Sept. 27, 2022

THE "CAP" PROCESS

A CLEAR MESSAGE FOR CHANGE

When Bill 109, *"The More Homes for Everyone"* Act, was introduced the message was clear that development application processing would need to be re-engineered in order to achieve the ambitious deadlines for approvals/decisions.

The stated purpose of the legislation is to reduce "red tape", accelerate development application review timelines, and streamline the approvals.

The realization was quickly reached by the York municipalities working group that:

- The exercise to modify development application processing was not about finding "ways around" the legislation. This was to be a serious analysis - and an opportunity to be seized - to make changes that may have been overdue
- This was not about process minor modifications – significant changes were required
- A focus on Pre Consultation or the front end of the process had the most potential to yield results

Further to that last point, it became clear that by placing more effort i.e. investing time at the front end, that the quality of information submitted in applications could be greatly improved, resulting in faster review and processing times.

This theme became one of the key underlying drivers for ideas and suggestions generated.

"NOT THE SAME OLD PROCESS"

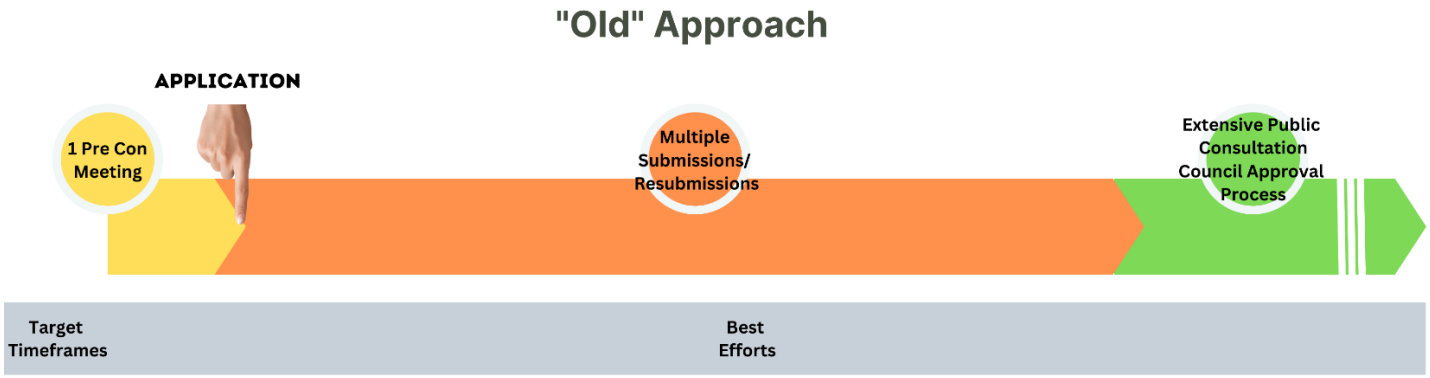
In general terms, the existing approach to development application processing can be described as follows;

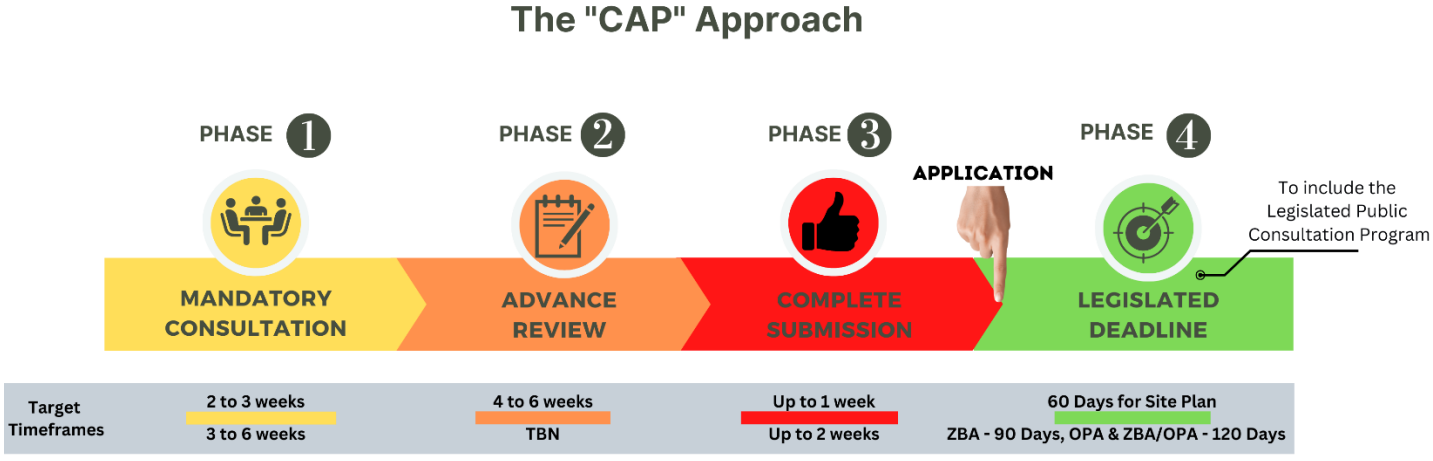
- The project begins with one "Pre Consultation" meeting
- The Applicant interprets the results of the meeting and the direction they have been provided
- Most often, instructions include a restriction that no information is to be submitted until the entire package of submission requirements has been met.
- In the vast majority of cases, after the first submission of the Application numerous resubmissions are required. It is not uncommon to have 4 to 8 resubmissions.
- Depending on the individual municipal approach to Public consultation, there may be several rounds of consultation as the project matures

Current challenges include:

- Not all internal departments and/or external agencies participate in the Pre Consultation Meeting
- Direction from this single initial exchange may not be comprehensive or fulsome to assemble a Complete Submission package
- Study Terms of Reference may not be clearly defined and in many instances are out of date or don't exist
- The Applicant is left to interpret some details regarding Complete Submission requirements based on one interaction
- Due to the restriction for full Complete Submission packages, timing becomes dependent on the last component to be completed
- The "Submission/Re-Submission" phase is often lengthy, repetitive and frustrating
- Many Public Consultation programs have been extended by individual municipalities to go beyond legislative requirements and in turn add to approval timeframes
- The full process steps and milestones may not be obvious to the Applicant
- The Applicant has no assurances of deadlines or that deadlines will be met

The Collaborative Application Preparation i.e. CAP process is described in greater detail in the section below, however to make the point that this is not the same old process, the following illustration sets the stage.





arget Timeframes are intended to be negotiated (TBN) with the Applicant on a case by case basis.
imeframes identified are aspirational and very much depend on the "minor" or "major" nature of the project.

COLLABORATIVE APPLICATION PREPARATION (CAP)

The CAP Process is a four phase process. Each phase has a purpose, a start and a finish;

Phase 1 – Mandatory Consultation

Seeks to establish CLARITY. Providing clear and comprehensive direction for the project. Establishing expectations and assisting the Applicant in making a successful quality Complete Application.

This phase takes the concept of the former "Pre Consultation" from a mere meeting to a series of meetings and/or communications with the intention to scope out the development project to a greater degree. Required supporting information and studies are determined at this point. This includes an assessment of only essential criteria and clear Terms of Reference are made available to guide preparation.

This phase ends with both the Applicant and municipality having a well understood vision for the project, as well as an assessment of applicable technical requirements that fit the scale and scope of the project. This is where the previously referenced "Minimum Viable Product" principle can be applied. The Developer has a clear set of directions on what is required to assemble a Complete Submission package, ideally a checklist to assist with assembly, ready access to study Terms of Reference and municipal design standards.

Phase 2 – Advance Review

To work towards QUALITY study analysis and quality technical design drawings. Quality work that meets Terms of Reference and municipal design standards leads to efficient development application processing.

With a well defined start to the project, technical review begins in Phase 2. The objective is to minimize excessive re submissions by having invested time up front in Phase 1. Through that extended engagement with the Applicant and their consultants, well defined expectations and continued interaction during Advance Review, the stage should be set for the required quality Application.

Phase 3 – Complete Submission

This is a short phase to reach READINESS. By taking "a moment" in time to ensure all reviewers are satisfied with the advancement of the project design and related analysis. Reviewers are confident that they can complete their reviews and final assessment of the project details within the legislated timeframes.

Phase 3 is a formal "signoff" by all municipal departments, key external agencies and the Applicant. In this instance, the Lead Planner is seeking confirmation from all reviewers that they are satisfied with the information submitted and reviewed and confident their work can be completed within the legislated timeframe. The Applicant is committing to their role in providing further information to support the reviewers in their final work

The Application is accepted at the end of Phase 3. The clock starts ticking.....

Phase 4 – Legislated Deadline

The final phase and based on EFFICIENCY. The municipality is poised to achieve the required Council approval or decision by the mandatory deadline.

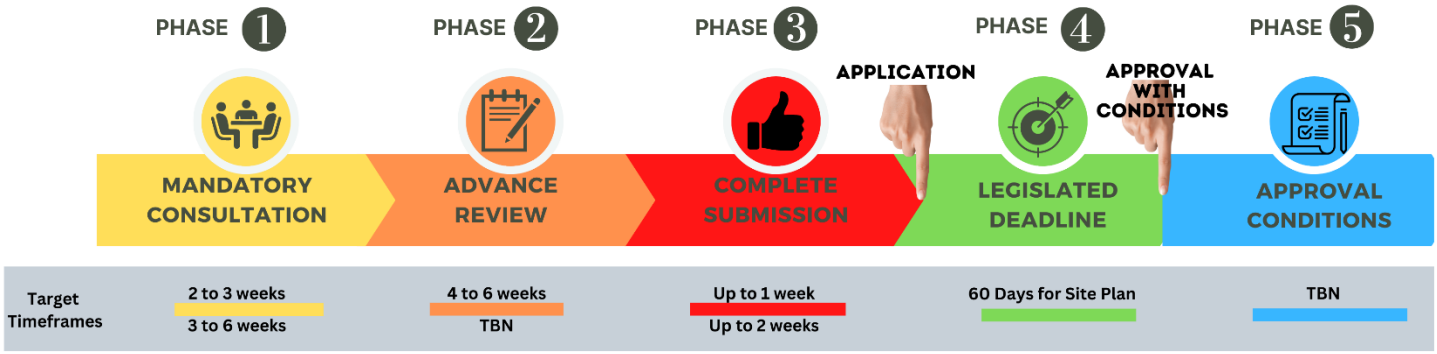
ABOUT THE SITE PLAN PROCESS

The CAP Process as described to this point, has been specific to ZBA, OPA, and joint ZBA/OPA. The Site Plan process is unique. As there is no legislated public consultation requirement and the approval authority is delegated to staff.

Site Plan applications can be as minor as an average fast food restaurant on an existing retail block to a major infill 30 story condominium with contaminated property on an arterial road requiring underground parking, transit integration and mitigating traffic impacts. The former may be quite achievable within the mandatory 60 day approval timeframe – the latter not so.

There was no clear conclusion reached as to a new Site Plan development application process that would allow municipalities to always meet the 60 day deadline for all Site Plan applications. However, it was agreed that the basic concepts of the CAP process were applicable. And that the concept of adding a 5th phase under the terms of a "conditional approval" system might be a strategy that could be applied, as illustrated below. This approach imagines achieving agreement on key issues within the legislated 60 days, culminating in approval subject to certain conditions. Satisfying the conditions would occur subsequent to the approval under the terms of an agreement.

Local municipalities within York Region are exploring ideas for adapting CAP for Site Plan applications and with ongoing exchanges, no doubt a common CAP based process will be developed that can be utilized by all.



Target Timeframes are intended to be negotiated (TBN) with the Applicant on a case by case basis.
Timeframes identified are aspirational and very much depend on the "minor" or "major" nature of the project.

ESTABLISHING TIMEFRAMES

"Time is money" and truer words were never spoken in the development industry.

Bill 109 has underscored that point on behalf of the development industry by establishing legislated deadlines for approvals/decisions.

Municipalities need to adopt practices to set and meet negotiated timeframes for milestones leading up to Phase 4 in the CAP process.

The CAP illustration on page 15 identifies timeframes. With a note that these are "aspirational" in nature and are within the purview of the municipality to set, taking into consideration the scale of the project.

This will be an evolutionary step for the York municipalities as they assess the impacts of the 2022 Acts and how timeframes can be negotiated. Amongst other things to be taken into consideration, this will no doubt require an assessment of internal resources and skillsets.

KEY CONCEPTS FOR EFFICIENCIES

As the CAP process was evolving a number of new work approaches were raised for consideration with the intent to provide efficiencies and streamlining. The following is a listing of some ideas that were generated that may have potential for supporting the objectives within each of the CAP Phases.

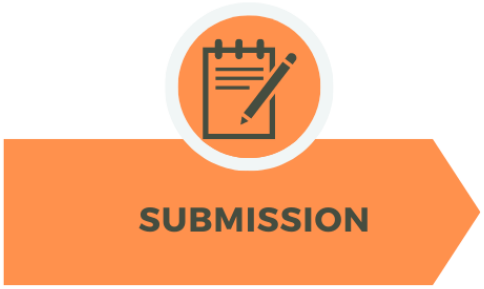
These are optional suggestions and may not be applicable for every municipality in York, nor every project. They are presented for consideration and inspiration to build on. Some have been incorporated in the Recommendations section with additional detail and reasons for consideration.

- coordination of Initial Consultation Meeting Schedules across the Region to facilitate participation
- expanded use of site visits – somewhat stating the obvious, by the suggested use of on site collective discussions to cultivate the vision for the project
- Design Charrettes – judicious use for larger community scale proposals
- Public Information Meetings – in the early stages to gage community interest and issues. Could be hosted by the Applicant and the municipality could determine their potential involvement
- determination of appropriate criteria required for review – applying the "Minimum Viable Product" principle in assembling direction for the Applicant as to Complete Submission requirements.
- negotiation of target timeframes – establish key milestones in the project and what it will take to achieve expectations and deadlines
- develop Process Maps, that clearly outline the anticipated program for Phases 2 and 3
- "The Understanding" - a signoff by all parties on commitments

The aforementioned "The Understanding" deserves an expanded explanation.

The Understanding is intended to be a business arrangement between the Municipality and Developer whereby they "sign off" committing to roles, responsibilities and timeframes

This is not intended to be an extended and extensive formal agreement. For example, a signback letter between the key players should suffice, and could document areas such as:
- confirmation of the agreement on Complete Submission
- clear study Terms of Reference
- negotiated review "bundles" (refer to Phase 2)
- to provide Phase 2 and 3 process details
- to confirm roles and responsibilities for all involved



PHASE 2

For the purposes of
QUALITY

- ✧ use of the common study Terms of Reference by all municipalities
- ✧ "Bundled Submissions" - negotiated staggered overlapping submission packages. Municipalities are encouraged to negotiate with the Applicant a logical flow of materials. For example, providing core data such as survey and block plans in the initial stages, for confirmation purposes, can establish foundational information and avoid revisions of multiple materials.
- ✧ preparation of a critical path to cover phases 3 and 4 highlighting roles and responsibilities for all parties
- ✧ formal "Escalation Protocol" available for immediate resolution of disputes

PHASE 3

For the purposes of
WHOLENESS

- ✧ Municipal departments, key external agencies and Applicant sign off on the critical path acknowledging their role in a successful Phase 4
- ✧ Agreement on a fully outlined Public consultation program and documented

PHASE 4

For the purposes of
EFFICIENCY

- ✧ Scaled down Planning Reports
- ✧ When required exemptions to internal administrative procedures in order to meet legislated deadlines and avoid the return of Application fees
- ✧ Reports to go directly to Council meetings
- ✧ Scheduing a Public Hearing and Bylaw for the same meeting of Council
- ✧ An expedited path for reports to receive internal approval and to be placed on Council Age

TAILORING BY LOCAL MUNICIPALITIES

The CAP process is not a one size fits all.

York municipalities have worked together to provide input to the outcome of this project. However it is well recognized that each local municipality must react to local circumstances and realities.

While CAP is a platform or "template" for how development application processing can be adjusted to react and meet the intention of new legislation, it is expected that York municipalities will tailor their processing accordingly.

The CAP process can be the base for how York municipalities assume a common business approach to development application processing across the Region.

A FINAL WORD ABOUT THE CAP PROCESS

Its no coincidence that "Collaboration" and "Preparation" are in the title of this new approach for management of development applications.

CAP will depend on collaboration by all parties. Through collaboration, taking time to prepare quality submissions will pay off.

"Give and take" is built into CAP, in that York Municipalities are taking steps never taken before in order to streamline the development application process. York municipalities are united in this effort.

In the way of a final illustration for the CAP process that breaks down the process phases in steps and summarizes the efficiencies that are available for consideration, a synopsis has been included in the Appendix

TERMS OF REFERENCE

COMMON USE BY ALL YORK MUNICIPALITIES

Developers rightfully note that current standards and modelling for infrastructure, environmental, traffic, stormwater management etc. vary from municipality to municipality. The concept of developing common Terms of Reference for study preparation, to be utilized by all York municipalities, was first brought forward as a result of the 2021 Provincial Audit and Accountability Fund (2021) – YorkTrax Review

Consistency and clarity with respect to the instructions for study preparation across the Region of York could result in benefits such as:

- Familiarity for the Development Customer – Applicants and Consultants working across York Region can become familiar with expectations, in turn creating efficiencies for their required studies

- Fewer challenges – questioning standards and requirements is less likely when multiple municipalities agree on TOR requirements

- Expansive expertise – building on a "two heads are better than one" ideology, allows multiple subject matter experts from York municipalities to pool their insight

A key focus of this project was to create a shared set of requirements for planning applications to assist in the evaluation of a development proposal.

COLLABORATIVE DRAFTING

The Working Group were engaged as part of a "collaborative drafting" exercise to review each of the draft TORs that were generated as part of the 2021 project and to coordinate input from any other members of their development application processing team. The Conservation Authority representatives also engaged in the review and editing work.

The McCauley and Moyle team took the opportunity during this period to propose some adjustments to the template for the TORs. Headings for the TOR template resulted in:

- ✧ LOCAL MUNICIPAL BRANDING
- ✧ About The Following Terms of Reference
- ✧ TOR Title
- ✧ Required by Legislation
- ✧ Who should prepare this?
- ✧ Why do we need this?
- ✧ What else should we know?
- ✧ MUNICIPALITY NAME Additional Terms
- ✧ MUNICIPALITY NAME Study Submission Instructions
- ✧ What other resources are there?
- ✧ Notes

McCauley and Moyle assumed the role of Editors to integrate the review responses received from the Working Group and their technical colleagues.

It was determined that the responses fell into two categories; 1) edits to wording and 2) comments which for the most part raised questions as to having certain requirements eliminated or explore further.

In the case of the edits, the action to be taken was clear. The Editors chose to incorporate all edits occasionally taking the opportunity to adjust some wording, solely for the purposes of simplification.

In the case of the comments, it was determined that additional examination by subject matter experts was necessary.

As mentioned earlier, a special Survey was prepared to collect BILD member opinions and experiences with respect to study TORs for past projects. A summary of all survey questions and responses in included in the Appendix. Opportunities to add remarks throughout the survey revealed a general theme of respondents, that being "too much information too soon", as highlighted in the following quotes.

"Ensuring that the right level of detail is requested at the proper time in the process. Requiring too much detail too early can be problematic and create too many revisions during the review process"

"Most of the report requirements have ballooned in the breadth and amount of information required at the Planning stages. We need to "right size" and scope the requirements for what is absolutely needed to facilitate high level planning decisions."

READY FOR USE AND FUTURE REFINEMENTS

The final results of the revisions to the Terms of Reference and associated recommendations for future action related to the comments received, have been summarized in the chart on the next page.

The Terms of Reference are now available for use by the local municipalities in York Region.

Having said that in the view of the McCauley Moyle team, the TORs are not finalized. In light of continuing interpretation of the new legislation, and the opportunities presented under a new era for development application processing, further edits to the TORs can be made.

By applying the TORs as they exist today, and establishing ways to monitor results of use, work can continue to edit and refine the requirements. "Ownership" of the TORs is critical to not only continue the work that has been initiated through this project, but to also have in place a means by which the TORs can always be kept current. This is addressed in the Recommendations section of the Report

A copy of the Terms of Reference have been included in the Appendix of this Report

1	Agricultural Impact Assessment	ϕ TOR is ready for use - monitor and record potential future updates
2	Archaeological Assessment	ϕ TOR is ready for use - monitor and record potential future updates
3	Architectural Design Control	ϕ TOR is ready for use - monitor and record potential future updates
4	Block Plan/Comprehensive Development Plan	ϕ TOR is ready for use - monitor and record potential future updates ϕ consider replacing with an alternative TOR that has been prepared based on Markham's Block Plan TOR (in light of the "Minimum Viable Product" approach)
5	Community Services & Facilities	ϕ TOR is ready for use - monitor and record potential future updates
6	Conservation Plan for Heritage Resources	ϕ TOR is ready for use - monitor and record potential future updates
7	Cultural Heritage Impact Assessment	ϕ TOR is ready for use - monitor and record potential future updates
8	Environmental Impact Study for Natural Heritage Features	STATUS ϕ Edits submitted were extensive and indicate a rewrite may be required ϕ Consider having the CAs draft on behalf of the municipalities
9	Environmental Site Assessment Phase One & Two	ϕ TOR is ready for use - monitor and record potential future updates
10	Erosion & Sediment Control	ϕ TOR is ready for use - monitor and record potential future updates ϕ TRCA comments are extensive and the edited version does not yet incorporate. Consideration could be given to arranging a specific meeting to discuss further refinements
11	Functional Servicing Report	ϕ TOR is ready for use - monitor and record potential future updates
12	Geotechnical Study	ϕ TOR is ready for use - monitor and record potential future updates
13	Hydrogeological Report	ϕ TOR is ready for use - monitor and record potential future updates
14	Hydrological Report	STATUS ϕ Several reviewers did not agree with the content of this TOR ϕ consider eliminating this TOR and transfer core requirements to the Stormwater Management TOR
15	Illumination Study	STATUS ϕ TOR is not complete ϕ two extensive rewrites for this TOR were provided and in turn two alternate TORs have also been prepared
16	Master Environmental Servicing Plan	STATUS ϕ Edits submitted were extensive and indicate a rewrite may be required ϕ Consider having the CAs draft on behalf of the municipalities
17	Noise and Vibration Study	ϕ TOR is ready for use - monitor and record potential future updates
18	Parking Study	ϕ TOR is ready for use - monitor and record potential future updates
19	Planning Justification Report	ϕ TOR is ready for use - monitor and record potential future updates ϕ references to the ROP have been removed in light of Bill 23
20	Retail and Service Needs Study	ϕ TOR is ready for use - monitor and record potential future updates
21	Stormwater Management Report	ϕ TOR is ready for use - monitor and record potential future updates ϕ an extensive rewrite for this TOR was provided and in turn an alternate TOR has also been prepared
22	Sun/Shadow Analysis	ϕ TOR is ready for use - monitor and record potential future updates
23	Transportation Demand Management Plan	ϕ TOR is ready for use - monitor and record potential future updates
24	Transportation Mobility Plan	ϕ TOR is ready for use - monitor and record potential future updates
25	Tree Inventory & Preservation Plan	ϕ TOR is ready for use - monitor and record potential future updates ϕ an extensive rewrite for this TOR was provided and in turn an alternate TOR has also been prepared
26	Urban Design & Sustainability	ϕ TOR is ready for use - monitor and record potential future updates ϕ an extensive rewrite for this TOR was provided and in turn an alternate TOR has also been prepared
27	Water Budget & Conservation Plan	ϕ TOR is ready for use - monitor and record potential future updates
28	Wind Study	ϕ TOR is ready for use - monitor and record potential future updates

RECOMMENDATIONS

1. SENIOR LEADERSHIP CHANGE MANAGEMENT SUPPORT
CAOs need to endorse the culture shift is required to manage the new era

In the "new era", Planners and Development Engineers will need to be enabled to be creative and decisive - not just be regulators. This will not happen organically - change management programs are required. Key players in development application processing should be able to rely on management leadership, internal support and assistance with the transition.

A new way of looking at skills development for Planners and Development Engineers is required. Establishing collaborative relationships, negotiating information exchange, project managing milestones and deadlines, making and living by timely decisions are examples of the future way of doing business under the terms of CAP.

ALL Staff involved in development application processing should be educated with respect to the impacts of the new 2022 legislation and come to understand the critical need for new business practices and meeting deadlines. This includes staff in other supporting departments such as Legal, Recreation/Culture, Fire and Clerks for example, all of whom will need to understand how their contribution to development application review and Council approvals will be critical in order for the municipality to avoid returning development fees.

Of particular concern is managing potential ethics issues for professionals. Conflicts as to decision making may surface given what could be in some instances, "the mad rush to approve". Professional staff may need guidance and backing

2. CREATE A "CONTINUOUS IMPROVEMENT COOPERATIVE"
Ownership of common development procedures and materials

If there is anything to take away from the experience of this project, it's that changes to legislation, housing supply demands and development application processing have only begun, and that new ways of doing business must continue to evolve in conjunction. The products generated by this exercise for use by all York municipalities need ownership and a mandate for continued refinement and alignment with ongoing demands.

It is suggested that a "Continuous Improvement Cooperative" be assembled i.e. a team of subject matter experts, mid to senior level management staff and representation by BILD to pickup where this project has concluded. This team should be connected with the Regional Planning Commissioner Committee, reporting in on a regular basis. A workplan for the team can be assembled based on the recommendations that follow.

3. PURSUE AND DOCUMENT "CERTAINTY AND COMMITMENT"
Providing service assurances for the Development Industry

The Stock Market, spaceships and babies thrive on Certainty and Commitment. As does the Development Industry. Most often this is driven by demands of their lending institutions and the pressures associated with mounting borrowing costs.

The CAP process is grounded on collaboration. Collaboration cannot exist without trust. To establish trust for Developers they need to have confidence that their projects will progress as described and meet deadlines.

York municipalities can gain the trust they need for CAP to be successful by being clear about expectations, roles and responsibilities for all involved in an application and determining target deadlines for key project milestones.

The Planning Commissioners play a lead role in supporting and training their staff to define the work for development applications integrating the concepts of certainty and commitment. By the same token, CAOs have the role to ensure that the corporation is backing the efforts to deliver on certainty and commitment. In particular the change management programs as outlined in Recommendation #1.

As well, external agencies - most particularly York Region and the Conservation Authorities - will need to offer and commit to meeting deadlines for review responses times or miss an opportunity to provide input.

To round out the picture, the Development Community will need to participate as a partner - not always in the position of a customer expecting service. As a partner in the process, Applicants will need to ensure that they and/or their consultants understand their responsibility in providing information and responses according to negotiated process targets.

CAOs

- Support a United Approach
- Support participation in ongoing refinements
- Corporate Culture Shift

Planning Commissioners

- Support a United Approach
- Ensure engagement in ongoing refinements
- Overseeing process and deadline pledges
- Planning and Development Engineering Culture Shift

External Agencies

- Guaranteed response times
- Active participation in Phase 1
- Input to ongoing refinements

The Developer

- Collaboration
- Active participation in ongoing refinements

4. ENSURE RESOURCES ARE IN PLACE TO DELIVER ON "CERTAINTY AND COMMITMENT"

Staffing and Skills to Meeting Business Objectives

In the ideal, municipal Planning and Development Engineering Departments will have the right number of resources with the required expertise and experience, and a full complement with which to deliver the CAP process.

It's unlikely that is the current circumstance in most of the York municipalities. The review of staffing levels, if not already underway should be initiated as a near term exercise, particularly in light of the extreme shortage of talent and the demand for experienced staff across the GTA.

Attracting and retaining staff may require new practices such as signing bonuses and retention pay.

By the same token, job descriptions and position objectives may need to be rewritten to ensure that development resources remain laser focussed operating in an environment that values streamlining, efficiency and meeting targets.

5. MAINTAIN THE NOTION OF THE YORK MUNICIPALITIES UNION

Maintain the value of using common practices and materials

The experience of this project has proven the benefits associated with "10 heads are better than 1".

The new CAP process and the study Terms of Reference are a collective effort that all York municipalities can use as a base to tailor to local circumstances.

Adopting common practices and materials is a customer centric service providing familiarity for those Developers working across the Region. Familiarity can lead to efficiencies for them and their Consultants.

The adage of "strength in numbers" comes to mind as we encourage all York municipalities to take advantage of the time invested by their staff and make use of the concepts and materials generated by this project.

6. CONSIDER SEVERAL PILOT PROJECTS TO ASSESS "CAP"

Testing "CAP" Concepts

CAP concepts need to be tested and refined.

By initiating several trial applications under the terms of CAP, the risks and deficiencies of this new approach could be identified and course corrections could be determined.

Consideration could be given to York Region assisting local municipalities by developing a few performance standards to evaluate successes and failures and assist with monitoring.

Selection of appropriate pilot projects would best be done in conjunction with willing BILD Applicants, supportive municipal Planning staff, Planning Commissioner backup and CAO approval.

7. GET BEHIND "EFFICIENCY CONCEPTS"

"CAP" is not the same old process

A number of new business approaches have been suggested within each of the phases of CAP as examples of how processing efficiencies could be incorporated. For example:

- "The Understanding" - the signoff to confirm and document required information, negotiated timeframes, roles and responsibilities etc.
- "Bundled Submissions" - permitting acceptance of staggered manageable information packages (vs refusal to accept information until a complete submission package has been assembled) under negotiated terms
- Escalation Protocol - a means by which an Applicant can make an immediate appeal for review if collaboration has stalled.

Some suggestion would apply to all municipalities, and some won't. Some will apply to all projects, and some won't.

The point being to consider alternative service delivery methods and build in flexibility to examine what may be appropriate approaches for each individual application. As well, to create a culture whereby creating new practices for efficiency and streamlining are a constant target

8. EXPLORE A COMMON FEE STRUCTURE

Not a common fee

Time did not permit the opportunity to dive into the possibility of developing a complementary fee structure that would match the resource expenditure of municipalities. At present, the CAP process places an emphasis on work up front, prior to an application being made. This puts the municipality at risk in having a project proceed to a mature state but stop short of an application being made -in which case no fee would be paid to cover the municipality's development application review work.

It is recommended that by working together (perhaps with municipal finance reps), a common fee structure be developed that would allow each municipality to determine their appropriate fee quantum.

9. CLEAR AND COMPREHENSIVE UPDATED PLANNING DOCUMENTS

Fully articulated community expectations and design standards

During the course of this project the issue of updating Official Plans arose a number of times from all sources; participating Planning Staff, Legal Counsel and Developers. Notwithstanding "opinions" on OPs, the impacts of the 2022 legislation dictates updating Official Plans for a number of reasons, the primary one being to assimilate the Regional OP into local OPs.

Based on the consultation with a municipal solicitor, it was highly recommended that municipalities update their OPs to address - in a comprehensive, yet concise manner - clear expectations for Complete Submission, study requirements and application processing prerequisites.

In addition, OPs take on a new level of importance with respect to communicating and keeping up to date the municipality's land use planning intentions for their community. Developers are looking for clear direction on how their properties are to be developed, with the expectation that if they deliver an application meeting the terms of the OP, then efficient processing awaits.

By the same token, other administrative planning documents should be updated to reflect expectations such as Site Plan bylaws and Consultation Bylaws

10. ASSESS THE CONCERN "TOO MUCH DETAIL TOO EARLY"

Right size technical requirements for the right time for review

Much of the BILD feedback centred on a frustration that requests for very specific information and technical analysis is being requested at the early stages of the project. In their view, this can lead to delays in the start of projects and unnecessary future revisions of work as the project matures.

Of particular concern is that too much engineering information is being required for planning decisions.

One of the foundations of this project is the concept of "Minimum Viable Product". In the Workshops this principle was discussed often - what is the minimum information required to reach a sound decision? This question needs to be embedded in the thinking and direction of each development application review. In some instances, this merely means shifting technical requirements to a later stage of review for an application.

Tailoring the requirements, and using the principle of Minimum Viable Product, should be given consideration for each project.

11. USE CHECKLISTS

Developing Shared Checklist Tools

In the spirit of providing a familiar framework for development customers across the Region, creating and making use of checklists can be a useful approach for consistency. Checklists are in common use amongst York municipalities. Fusing together the current content available (taking into consideration the point made in 10. above) to generate common checklists would be of value. Indeed work of this nature was touched on during this project by the Region and would be complimentary to the CAP process.

12. DONT USE CHECKLISTS AS "SHOPPING LISTS"

Using Checklists to determine the right requirements at the right time

At the risk of sounding repetitive, this recommendation is intended to underscore the Minimum Viable Product principle.

A checklist can be a temptation to "pile on" and check extra boxes "to be on the safeside". Prudent use of checklists is the point to be made here.

13. CUSTOMER SERVICE ENHANCEMENTS

Providing Assistance so that Customers Achieve Success

An example of customer service was provided during the project which bests describes this recommendation. York Development Engineering is in the habit that when specifying a design standard to be used, rather than merely identify the standard and leaving consultants to hunt down the detail - a copy of the standard is actually provided.

There are no doubt other opportunities to provide assistance for achieving customer success throughout the application review process

14. DEVELOP CORPORATE CHANGES TO EXPEDITE COUNCIL CONSIDERATION

Rethink the final stage of the development application process

The final stage of the CAP process begins with a quality Complete Submission - and the clock starts on the legislated timeframe for approval/decision by Council. Notwithstanding the preparatory work ahead of this stage, in some instances meeting the mandatory deadlines will be challenging. Anticipating that ways to weave through this "back end" of the process will need to be available, may be prudent.

A review of internal corporate policies are required to explore expedited paths to Council Agendas and approvals, such as;

- accelerated channels for reports through senior management review and Clerks department protocols
- scheduling Public Hearings and Bylaw approval at the same meeting of Council
- placing Planning Reports directly on Council Agendas where feasible
- expanded Delegated Authority

Corporate support to ensure success in meeting legislated timeframes will help to minimize any return of development application fees.

15. SIMPLIFIED AND SUCCINCT PLANNING REPORTS

Preparing shorter reports within shorter timeframes

Still in keeping with meeting legislated timeframes, the issue of Planning Report preparation needs to be addressed.

Typically Planning Reports are comprehensive, extremely detailed reports summarizing all aspects of the projects. Not necessarily for the edification of Council, but "for the record" in anticipation of defending future challenges. Is there a new balance that could be created whereby Planning Reports to Council could be viewed not so much as a tome, but rather created under the Minimum Viable Product principle?

16. ADJUST PUBLIC CONSULTATION TO ADHERE TO PLANNING ACT INTENT

Realigning public consultation

Public and Council have become accustomed to receiving input as part of the planning process. Indeed many municipalities have expanded public consultation beyond legislative requirements.

Extensive public input is a legislative requirement when an Official Plan amendment is being considered. Conversely, if something conforms with an OP the principle of that type of development has already been legally determined. That being the case, the Planning debate is largely over.

For the purposes of expediency, consideration should be given to modifying public consultation programs to fit the intent of the Planning Act, i.e. extensive public engagement for major planning initiatives such as Official Plans and reliance on the Planning Act notice required for processes that implement an Official Plan.

17. WEBSITE COMMONALITIES

Access to Comprehensive and Similar design info on York municipal websites

A scan of the York local municipal websites indicates some excellent information and direction for development customers. However, a wide variety of content and format.

No doubt corporate policies dictate how Planning and Engineering departments can identify guidance for applicants, but along the same lines of familiarity that was addressed in Recommendation 5, could York municipalities agree on posting of common materials such as the Terms of Reference and checklists? Could agreement be reached on posting annual local municipal Consultation Meeting schedules and Engineering standards?

In general an effort to coordinate consistent material availability would be helpful so that development consultants in particular could count on accessing process and design information on websites

18. COORDINATE "INITIAL CONSULTATION MEETING" SCHEDULES

To encourage and facilitate focussed involvement in the early project stage

Initiation Consultation Meetings are the "kickoff" meetings for projects. They are intended to replace the former "Pre Consultation Meeting". The difference being they may be the first of several meetings required to set the stage for quality content and expeditious processing.

With the expected number of meetings taking place on an annual basis, there is the potential for conflicts which could present difficulties for external agencies and consultants to attend. Coordination of the municipal meeting schedules could facilitate involvement by key players in the early stages of project development

19. ENSURE THOSE INVITED TO COMMENT HAVE CRITICAL INPUT

Asking the Question "Is this adding value?"

It is not uncommon to have various departments, other organizations or stakeholders request to be copied on development application circulations. While good intentioned, additional input can be superfluous and not necessarily address the core need. Rather then burden the application distribution process, there may be alternative ways to address such requests if in fact the objective is to be kept updated or to collect specific data. Assessing the distribution list each time for required input only is a prudent step to take.

20. CONSULTANT WORK QUALITY - A PRE QUALIFIED ROSTER

Using pre qualified consultants to potentially avoid peer reviews

The concept raised in this recommendation suggests that York local municipalities could consider collectively assembling a list of consultants, that if engaged by Applicants for specific study preparation, would negate the need for peer reviews.

The idea being that having confidence in consultants based on their past work and completion of a pre qualification process, municipalities would accept the studies as being from a reliable expert.

21. QUALITY CONSULTANT WORK - SUPPORTIVE PLANNING ACT CHANGES

Poor quality submissions may end up being rewarded

Bill 109 has introduced the concept of Application fees being refunded if mandated deadlines are not met. Poor quality submissions are a primary cause of extended review periods. Hence the connection could be made that poor quality submissions may force municipalities to risk missed approval deadlines and in turn be required to provide a fee refund. An ugly prospect for municipalities. The last alternative being to issue a denial. An ugly prospect for Applicants.

In the past the issue of quality has not been highlighted meaning that to some extents consultants were not motivated to ensure quality work for each submission.

The Planning Act is silent on the issue of quality and only speaks to complete submissions. "Complete" does not mean "Completed Correctly". The Planning Act could be modified to make that clarification.

One tool that would be of benefit in this regard would be to incorporate within the Planning Act the ability to "stop the clock" within the mandated timeframe as municipal staff and Applicants work towards Completed Correctly. This concept is utilized elsewhere, for example with respect to Building Permit issuance.

22. QUALITY CONSULTANT WORK - EXPLORE THE CONCEPT OF RATING

Raising the bar and limiting exceptions for unacceptable quality

The CAP process mantra is;
"more work up front = quality submissions = efficient processing

Which in turn leads to faster approvals.

A consistent concern expressed by municipal staff - for many years - has been with respect to the completeness and quality of information and design drawings submitted for review. In many instances this may be due to lack of clear direction. In other cases, it may be a consultant rushing to submit and/or relying on the municipality to catch any mistakes and to fill in design gaps. Regardless, this situation wastes time, unproductive reviews and delays approval of designs. This added time is costly for both Developers and municipalities.

There is no room for wasted municipal staff time and effort in the CAP process.

It is proposed that a simple rating system be prepared by which municipalities could record the quality of submissions received from consultants. This is not intended to be a punitive exercise nor to damage reputations. Rather a factual documentation of experience that can be shared across York municipalities and upon request by applicants.

The intention is to motivate consultants to receive positive ratings for quality work.

23. CONSULTANT WORK QUALITY - RELYING ON "THE SEAL"

What will it take to increase confidence in professional stamps?

A consistent lament of municipalities for a number of years has been the decreasing quality of technical submissions from practitioners representing a number of professions. There are many examples provided as to incorrect and non standard designs and studies that are submitted and "caught" during municipal reviews.

In turn, there is little confidence in the accuracy of a study or design once it has been stamped by a professional. This is more than unfortunate, particularly now with the demands of expedited development review. If municipalities could rely on adherence to standards or terms of reference and accuracy of designs, much much time could be saved in the review process.

As an example with respect to expectations for the professional engineer seal in the "The Use of the Professional Engineer's Seal" document, issued by the Professional Engineers Ontario (PEO), practitioners are guided as follows:

Assuming responsibility means the practitioner could be held accountable in the event of professional misconduct or incompetence regarding the engineering work

Proper use of the seal is essential, since broad compliance with these rules serves the public interest, by providing:

- *Accountability–signing and sealing identifies the practitioner or practitioners who assumed responsibility for the document's engineering content; and*
- *Reliance–by signing and sealing a document, a practitioner attests that others may place reasonable reliance on its engineering content for its specified purpose.*

Based on the experiences of municipal reviewers, municipalities do not have "reliance" on engineering content in many instances. This must change and return to the intention as described by PEO. Other professional associations would have similar descriptions for the use of professional stamps

In order to prompt the return to reliance, a couple of actions could be considered;

- this matter could be taken up by groups such as the Regional Planning Commissioners (RPCO) and/Regional Public Works Commissioners (RPWC). Engagement with the province, OPPI, PEO, OALA, ACEC etc could unfold to discuss possible solutions

- York Region and local municipalities could raise examples of unacceptable study and design submissions with professional associations, and where applicable put in question the license to practice for individual practitioners or firms.

From the Professional Engineers Ontario Website

Affixing the seal on documents and drawings indicates they are final for the intended purpose and have been prepared by or under the supervision of a person licensed to practise professional engineering who is assuming responsibility for them. By sealing documents and drawings, licence holders acknowledge that they assume professional responsibility for the design, opinions, judgments or directions given in the documents and drawings.

24. CAPITALIZING ON RELIABLE ENGINEERING CONSULTANT WORK

Benefiting from good quality work

Perhaps building on the concept of pre qualification as outlined in Recommendation 20, and assuming success in some way regarding an increase in confidence in engineering designs as the outcome of Recommendation 22, consideration could given to creating unique situations for some development applications.

For example, if a municipality felt they could rely on quality design work from an engineering firm, a negotiated agreement with the Developer could result in a significantly scaled down review of submitted designs and expedited move to construction in exchange for terms that could include:

- increased insurance coverage
- full time inspection during construction
- an extended period for assumption of works

This is a rather simplistic description of potential arrangements - the point being that in those instances where engineering designs could be considered reliable, alternate arrangements could be considered by the municipality.

25. EXPLORE THE CONCEPT OF SHARING STAFF AND/OR EXPERTISE

"Pooling" to have access to subject matter experts when required

The new legislation brought into play in 2022 has changed some roles and responsibilities. Most particularly with respect to Regional and Conservation Authority involvement. How municipalities fill the gap left by CAs has yet to be determined. A constant focus on official plan and administrative planning document upkeep will not doubt be required as well. It is also anticipated that the volume and pace of applications within each municipality will indeed increase.

Could York municipalities assemble a pool of experienced resources that they could each call on to assist with workload leveling and specific subject matter expertise? Potentially this could include expertise not currently available to some municipalities, for example heritage, illumination, noise and vibration etc. This could be a place to tap into retired staff know how and those that prefer a contract work environment - potentially from across the province. Under this scenario could some Peer reviews be eliminated?

New era..... new ways of doing business.....

26. COMMUNITY PLANNING PERMIT SYSTEM

Exploring New Concepts

Admittedly, this concept was not discussed during the project. However is raised here in light of some recent related uptake in Ontario municipalities and the following reference that was included in the September 2022 BILD report:

The lack of development permit systems in Ontario and the GTA, which are permitted by Ontario's Planning Act would appear to be one significant difference in approach in the Province compared to the rest of Canada.

Consideration could be given to exploring any potential as another tool for York municipalities.

27. ENHANCED COORDINATION WITH DEVELOPMENT ENGINEERS

Supporting Development Engineers for expedited reviews

The impacts of the new legislation will most likely result in an increased volume of applications and shorter timeframes for review. The consequences of not meeting deadlines may mean a return of application fees and as such the pressure to provide responses and solutions by negotiated deadlines will ramp up.

In particular, this will have implications for the work undertaken by Development Engineers. Although Development Engineering input was provided during this project, there was not widespread consultation across the Region.

These professionals are key players and ensuring they have a full understanding of the "new era", along with monitoring the full impacts on their role due the changing circumstances, is critical. It is recommended that specific attention be provided to this group in the way of initial orientation to the new legislation and establishing touchpoints with these individuals as the CAP approach unfolds.

28. LEAD PLANNER AUTHORITY

Planners need permission to make decisions that will achieve timeframes

Discussions at the corporate level may be required to determine strategies and support that need to be in place to assist lead Planners in achieving negotiated timeframes and ultimately Council approvals/decisions. All with the ultimate goal of not returning application fees.

Planning staff are accountable for the projects they manage, but do not have the say-so to control all aspects of the development review process. They rely on input from a number of internal departments. They can define a deadline for that input - but do not have the authority to direct other departments in adhering to deadlines.

Could lead Planners be assigned some proactive authority, that would allow them to proceed in absence of responses they and their Manager deem of acceptable consequence - in order to maintain the momentum for application processing required to achieve deadlines?

Only discussion at the corporate level can determine what is in the municipality's best interest.

29. KEEP THE MOMENTUM GOING

The value of collaborative staff exchanges has been proven

The CAP process is a synergistic example of what collaboration by staff across York Region are able to accomplish .

This recommendation circles back to Recommendation #5 to suggest that in addition to making use of the deliverables of this project, to encourage and provide opportunities for Planning, Development Engineering and other key participants in development application processing, to carry on to come together.

Continued interaction can be a "breeding ground" for ongoing exchanges of best practices. Not to mention the peer support that will be of great value as the recent and future legislative changes unfold.

GOING FORWARD

2022 was a year of significant change for Ontario municipalities with respect to development application processing.

Legislative impacts were sweeping and fast paced, creating challenges on how to interpret and react accordingly.

The positives that rise to the surface are that the rapidity and quantity of housing supply will no doubt increase through new ways of doing business. And there is agreement that it was time to make changes to business practices for development application processing.

A significant takeaway from this project is the fact that there is alignment amongst those that participate in developing communities across the Region.

At one of the meetings with members of BILD, there was acknowledgement that the following are shared interests of York Region, the area municipalities, and the development industry;

More Housing
Quality Communities
Faster Processing
Clarity
Reduced Frustrations
Meeting Legislated Timeframes
Service Improvements

Through collaboration under the terms of a CAP process approach, these shared interests are achievable.

In the view of McCauley and Moyle, municipal leaders will be required to support the intention of collaboration through supportive efforts that Change Management concepts can provide. From the municipal perspective, the CAP process cannot function and deliver on its own – resources, attitudes and skillsets need to be in place to contribute to success.

"CULTURE EATS STRATEGY FOR BREAKFAST"
Peter Drucker

"IF THERE IS NO STRUGGLE, THERE IS NO PROGRESS"
Frederick Douglass

By the same token, the development industry must anticipate growing pains as the new process unfolds and matures. In some instances, collaboration will indeed require patience and trust.

APPENDIX 1

List of Stakeholders involved in Workshops, Interviews, Presentations and BILD Consultations

York Region Participants

Project Team
Teema Kanji, Project Lead
Julie Millson, Project Manager

Senior Leadership
Paul Freeman, Chief Planner, York Region
Karen Whitney, Director, Community Planning & Development Services
John Houweling, Director of Data, Analytics and Visualization
Andrew Satterthwaite, Manager, Partnerships - Data, Analytics and Visualization

Planning
Asif Abbas
Sarah Brockman
Augustine Ko
Justine Wong
Jason Ezer
Karthyn Cymbalisty
Donna Moritsugu
Christine Meehan
Niranjan Rajevan
Maryam Ahmed
Tiffany Wong
Ryanne Ziegler
Ho, Vicky
Duncan MacAskill

Development Engineering
David Mhango
Calvin Mollett
Trevor Catherwood

Working Group Participants

Local Municipality Representatives
Aurora: Bill Butler, Lawrence Kuk
East Gwillimbury: Victoria Moore, Jack Smith
Georgina: Alan Drozd, Janet Porter
King: Gaspare Ritacca
Markham: John Yeh, Brad Roberts
Newmarket: Meghan White, Scott Ansell
Richmond Hill: Deborah Giannetta, Gus Galanis
Whitchurch-Stouffville: Hena Kabir
Vaughan: Christopher Cosentino

Conservation Authority Representatives
Brad Stevens, TRCA
Sameer Dhalla, TRCA
Steve Heuchert, TRCA
Lisa.Facini, TRCA
Mark.Howard, TRCA
J Marko, LSRCA
J Chan, LSRCA
Glenn MacMillan, LSRCA
Dave Ruggle, LSRCA
Emma Dias, LSRCA
Kenneth Cheney, LSRCA

Planning Commissioners Interviewed

Steven Naylor, King
Arvin Prasad, Markham
Haiqing Xu, Vaughan
Dwayne Tapp, Whitchurch-Stouffville
Harold Lenters, Georgina
Kelvin Kwan, Richmond Hill
Lawrence Kuk, East Gwillimbury
Peter Noehammer, Newmarket
Mario Ramunno, Aurora

Regional Planning Commissioner Meeting Participants

Darryl Lyons, Markham
Jason Unger, Newmarket
Adrian Cammaert, Newmarket
Kelvin Kwan, Richmond Hill
Maria Flores, Richmond Hill
Gus Galanis, Richmond Hill
Nancy Tucker, Vaughan
Christina Bruce, Vaughan
Meaghan Craven, Whitchurch-Stouffville
Darryl Beaulieu, Georgina

CAO MEETING PARTICIPANTS

Bruce Macgregor
Doug Nadorozny
Tom Webster
Daniel Kostopoulos
Nick Spierensi
Andy Taylor
Darlene Joslin
Ryan Cronsberry
Ian MacDougall
Rob Adams

BILD PARTICIPANTS

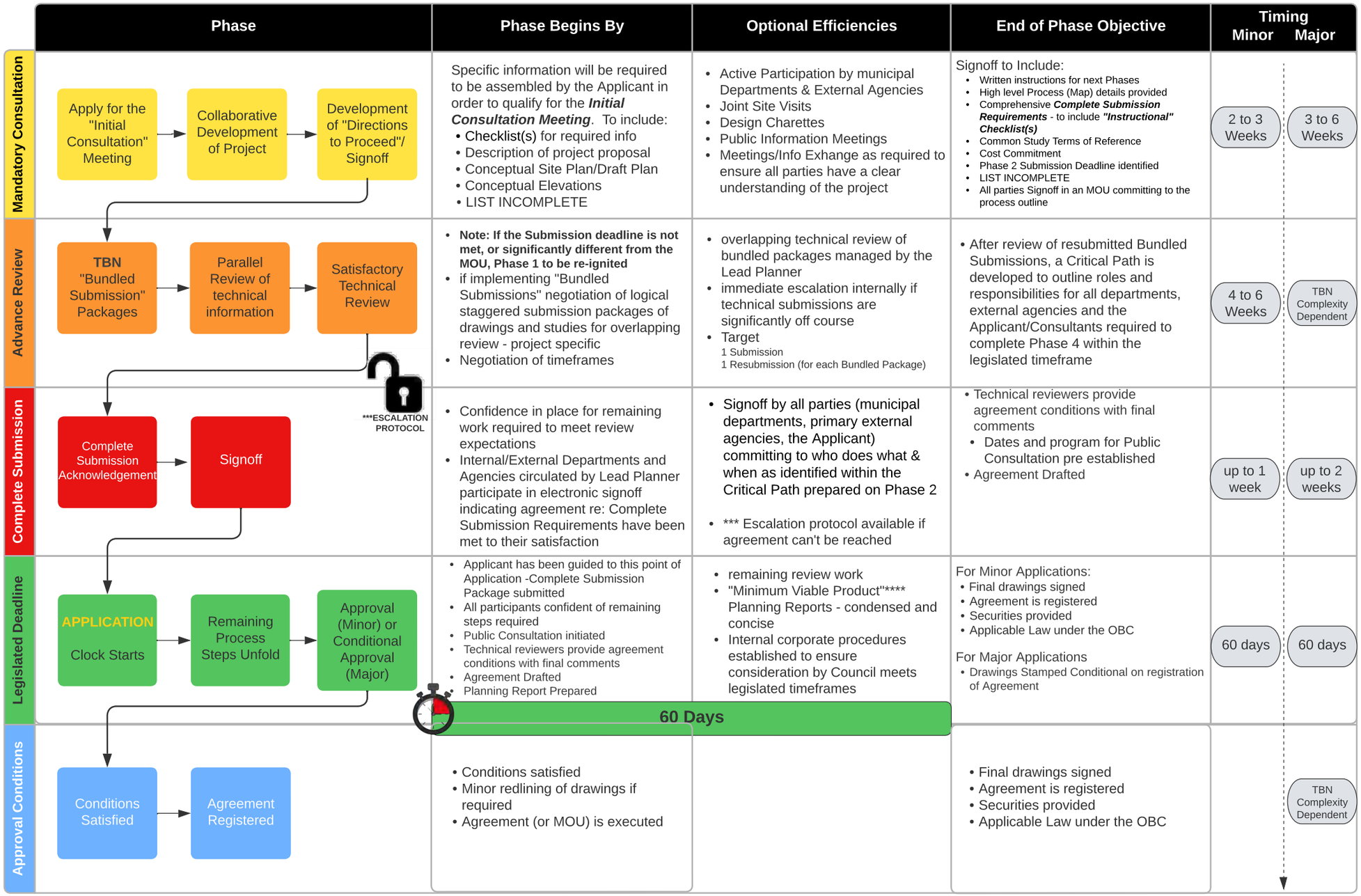
Over 60 members of the Building Industry and Land Development association participated in several meetings

Others

Valerie Shuttleworth, Consultant

APPENDIX 2

CAP Illustration – Phases, Steps, Efficiencies at a Glance



NOTES

Initial Consultation Meeting Requirements
- *anticipated to be a shared list across the Region*

Complete Submission Requirements
- *anticipated to be a shared list across the Region*

"Instructional" Checklists
To go beyond a mere identification of the requirement, by referencing specific design Standards and instructions to assist with Applicant compliance

Bundled Submissions

SAMPLE

BUNDLE ONE
- "Core" Information (eg Survey Plan, Block Plan, Zoning Matrix etc)
- Bundle Two not to be submitted until Bundle One confirmed within agreed to timeframe

BUNDLE TWO
- Drawings and studies related to underground design

BUNDLE THREE
- Drawings and studies related to aboveground features and technical design

TBN - To Be Negotiated

*****Escalation Protocol**
An Escalation Protocol is to be established by each municipality available for judious use by Applicants during Phases 2 & 3. Applicants, who perceive undue delays or an inability to reach agreement on their submission can request the matter be brought to the attention of the Chief Planner to seek resolution immediately

******Minimum Viable Product**
Addressing the question - "What is the minimum information that is required in order to make a sound decision?"

NOTE: Target Timeframes are intended to be negotiated (TBN) with the Applicant on a case by case basis.
Timeframes identified are aspirational and very much depend on the "minor" or "major" nature of the project.

APPENDIX 3

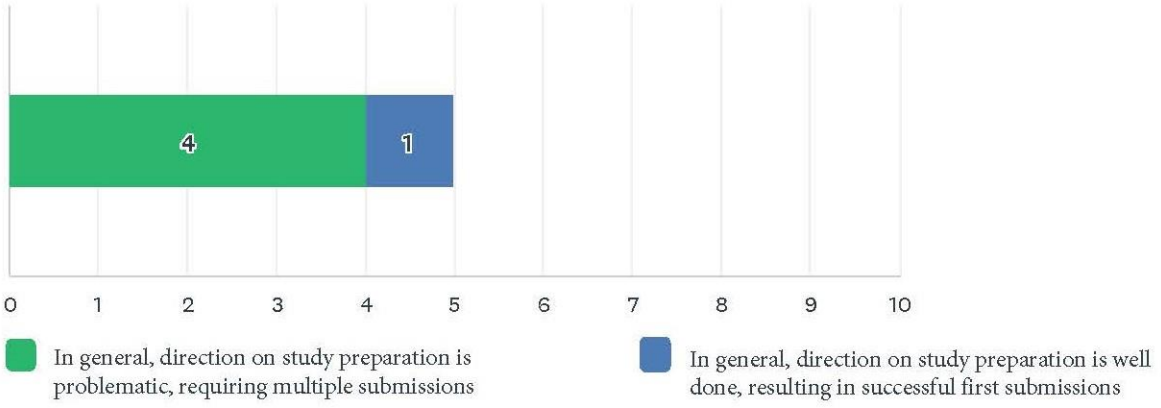
BILD Terms of Reference Survey Results Summary

Q1 My role in development application processing is;

Answered: 9 Skipped: 0

Q2 Agricultural Impact Assessment

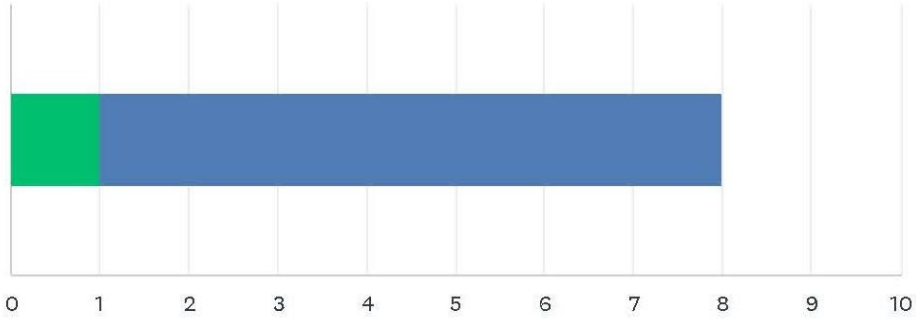
Answered: 5 Skipped: 4



#	GENERAL COMMENTS
1	Consideration should be given to not require this for lands within the urban boundary as defined by the municipality/region.
2	Not always clear on the issues that may or may not need to be addressed.
3	Study is irrelevant.

Q3 Archaeological Assessment

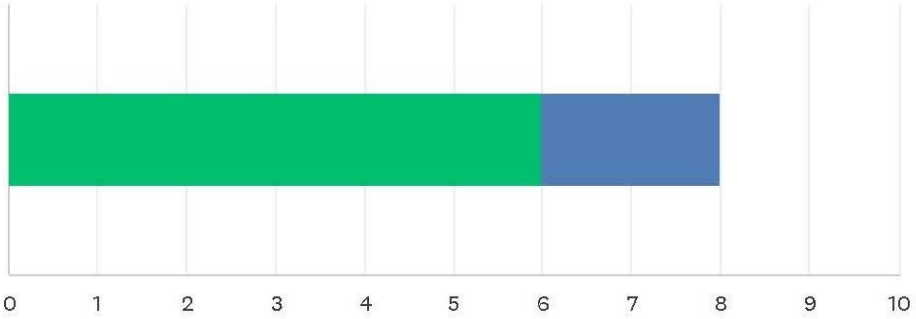
Answered: 8 Skipped: 1



#	GENERAL COMMENTS
1	Can be convoluted and directionless process when numerous interests have to be considered. The Ministry should provide clear direction and not be afraid of / influenced by First Nations groups.

Q4 Architectural Design Control

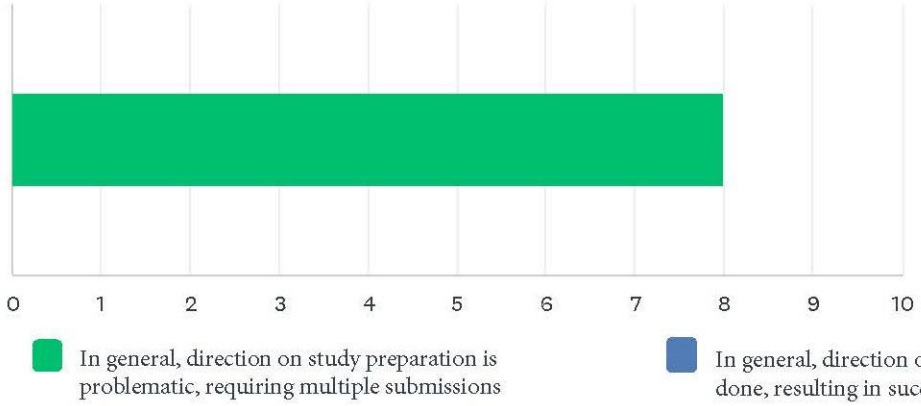
Answered: 8 Skipped: 1



#	GENERAL COMMENTS
1	Architectural & Urban Design policies are included in the Official Plans (Regional and local), Secondary & Tertiary plans and Design Guidelines that often conflict and are dated. In addition, Urban Design Review Panels have been established as another layer of design review over and above the City Urban Design staff review. The TOR for Architectural Design must limit the extent to which exterior design may be addressed through site plan control to those areas prescribed in the Planning Act as amended by Bill 23.
2	Far too much level of detail required especially during the early stages of approval.
3	Many "fingers in the collective ADC pie". Highly subjective and left to the personal taste of individual City staff. Bill 23 has eliminated Design Control as of the Nov. 28, 2022 being the date of Royal Assent.

Q5 Block Plan/Comprehensive Development Plan

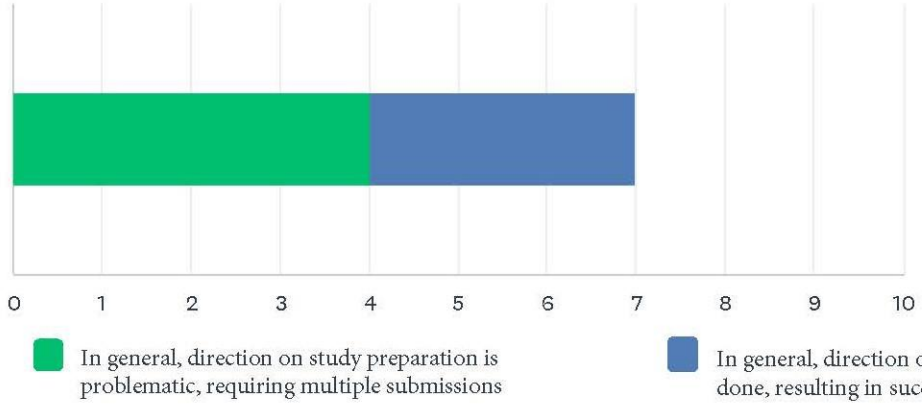
Answered: 8 Skipped: 1



#	GENERAL COMMENTS
1	Block Plans are not a requirement under the Planning Act and should be removed. Block Planning has evolved into an endless behemoth process that will be duplicated in subsequent Development and Engineering approval processes.
2	We are now requiring draft plan level details for essentially a A Tertiary Plan. It seems redundant and requirements can be scaled back.

Q6 Community Services and Facilities Study

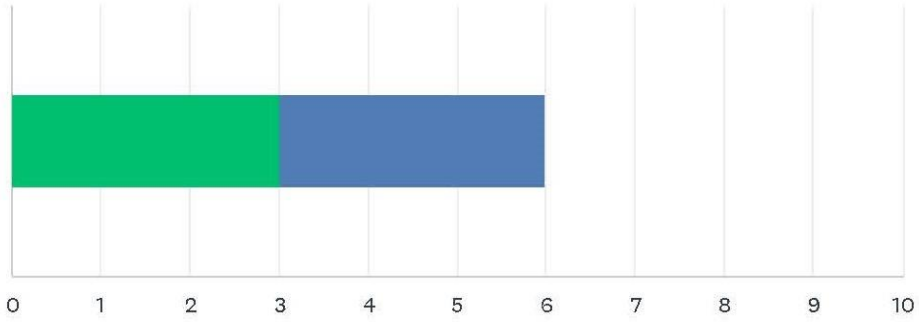
Answered: 7 Skipped: 2



#	GENERAL COMMENTS
1	This is one area that needs a consistent TOR.
2	When the City follows its DC levels of service and is engaged in the timely delivery of Parks etc.

Q7 Conservation Plan for Heritage Resources

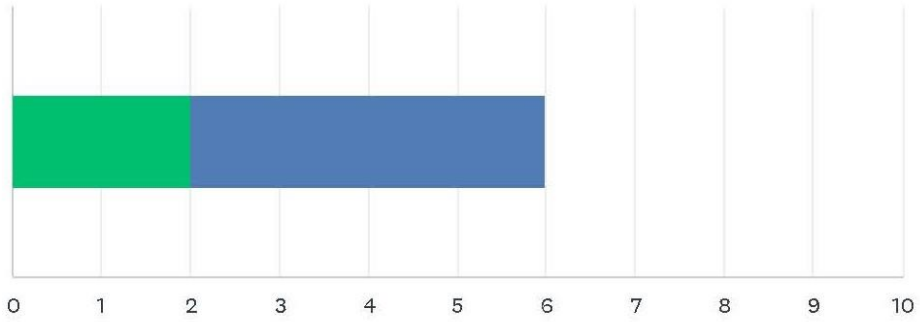
Answered: 6 Skipped: 3



#	GENERAL COMMENTS
1	A highly subjective review and threshold for Heritage Conservation. I understand that the Province is looking to better define the criteria and thresholds for designating properties under Part IV of the Ontario Heritage Act. At the moment, the bar for designation is so low / undefined that properties are being designated on baseless, municipally expedient and politically motivated reasons, not fact based / professionally examinable criteria.
2	Very onerous requirements place a greater burden on developers which results in less chances of success of the heritage resource. Consider making the conservation plan requirements post regisration.

Q8 Cultural Heritage Impact Assessment

Answered: 6 Skipped: 3



#	GENERAL COMMENTS
1	As above, a highly subjective review and threshold wrt Cultural Heritage, as well. I understand that the Province is looking to better define the criteria and thresholds to guide the submission and review of the assessments being created and reviewed by Municipalities.
2	Works well when the outcome is as both parties expect.

Q9 Environmental Impact Study for Natural Heritage Features

Answered: 9 Skipped: 0

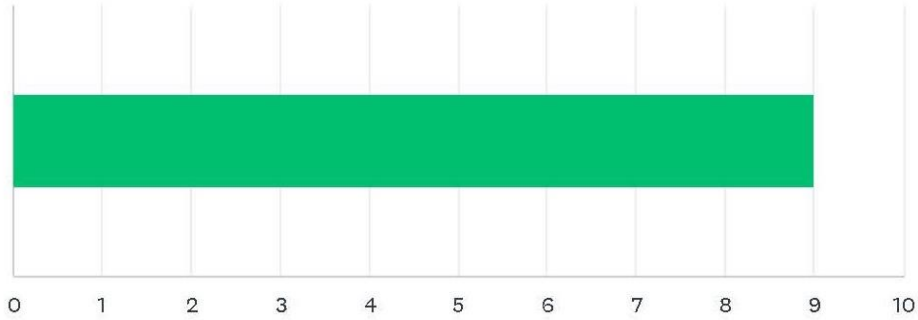
In general, direction on study preparation is problematic, requiring multiple submissions

In general, direction on study preparation is well done, resulting in successful first submissions

#	GENERAL COMMENTS
1	Several stakeholders and numerous policies in municipal and CA documents makes this area problematic in many cases.
2	A clear definition is required for net positive impacts, along with clear thresholds for compliance. Who makes the determination as to what is or isn't a net positive impact? What's the timeline for their assessment? Is a denial appealable? Who reviews and approves applications / reports, the Municipality or the Conservation Authority? I believe Bill 23 via Reg's is looking to focus CA's responsibilities back to the core components of the Conservation Act.
3	Environmental agencies have continuously required more and more. Consider scaling requirements back.

Q10 Environmental Impact Study for Natural Heritage Features

Answered: 9 Skipped: 0

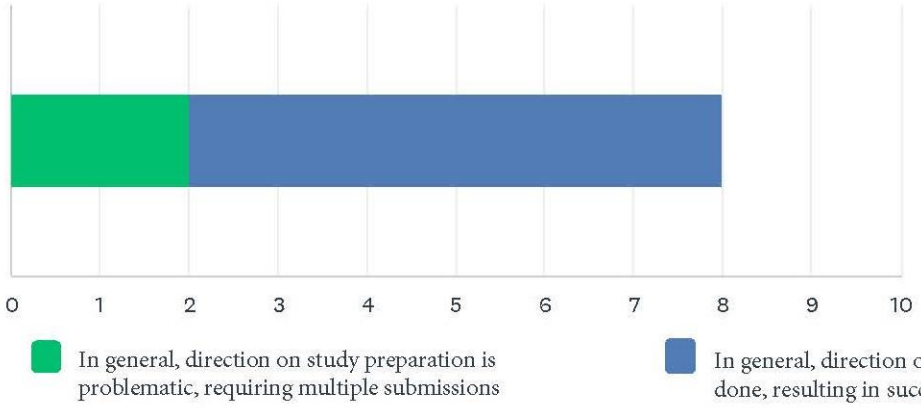


In general, direction on study preparation is problematic, requiring multiple submissions

In general, direction on study preparation is well done, resulting in successful first submissions

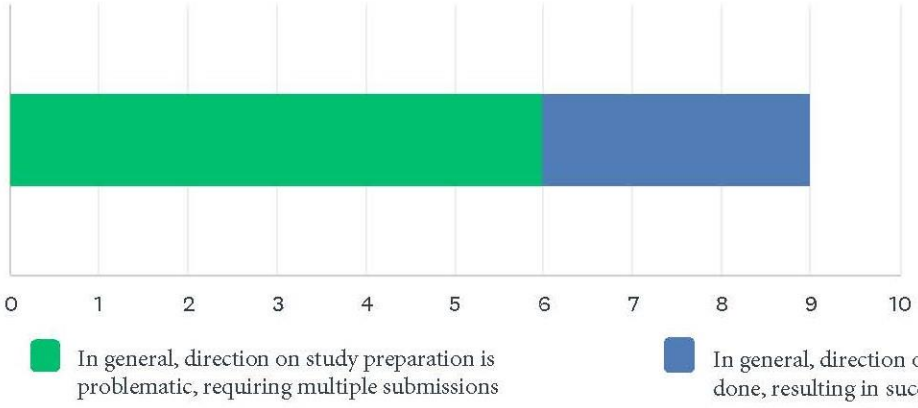
Q11 Erosion and Sediment Control

Answered: 8 Skipped: 1



Q12 Functional Servicing Report

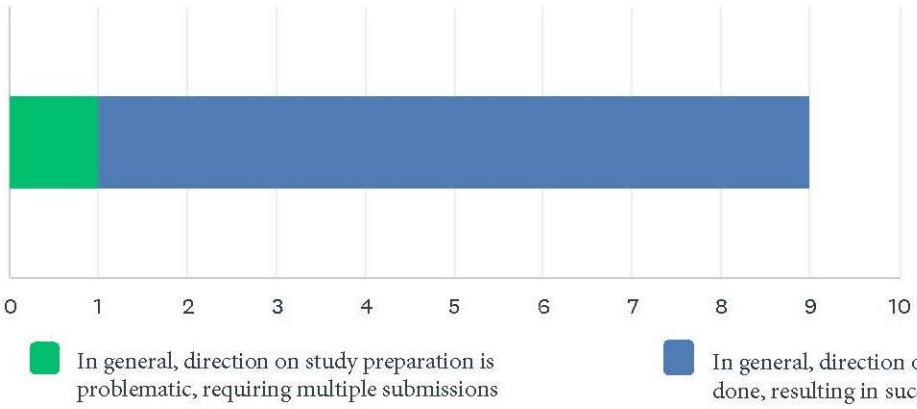
Answered: 9 Skipped: 0



#	GENERAL COMMENTS
1	Should be scoped for Planning submissions and then submitted in more fulsome form with Engineering submissions.

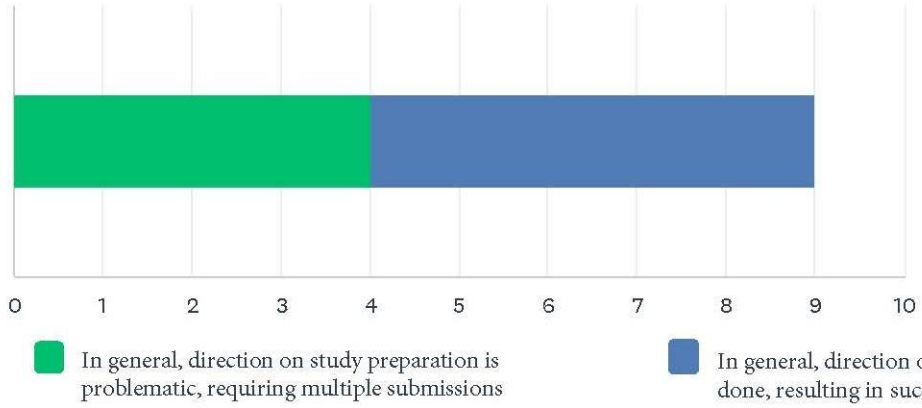
Q13 Geotechnical Study

Answered: 9 Skipped: 0



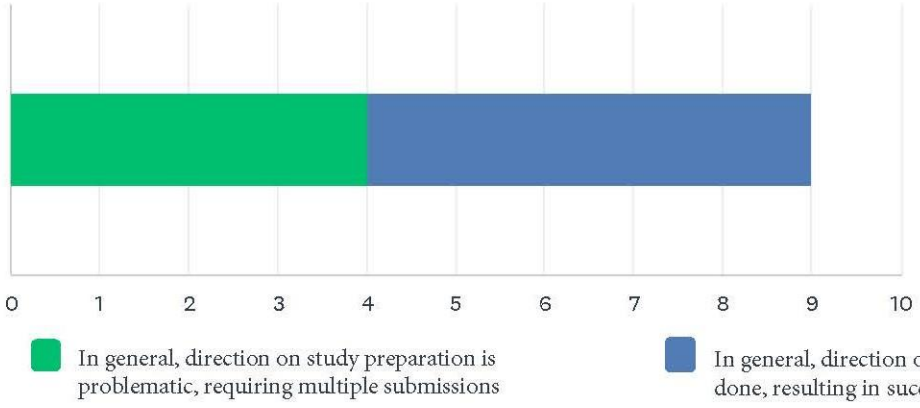
Q14 Hydrogeological Report

Answered: 9 Skipped: 0



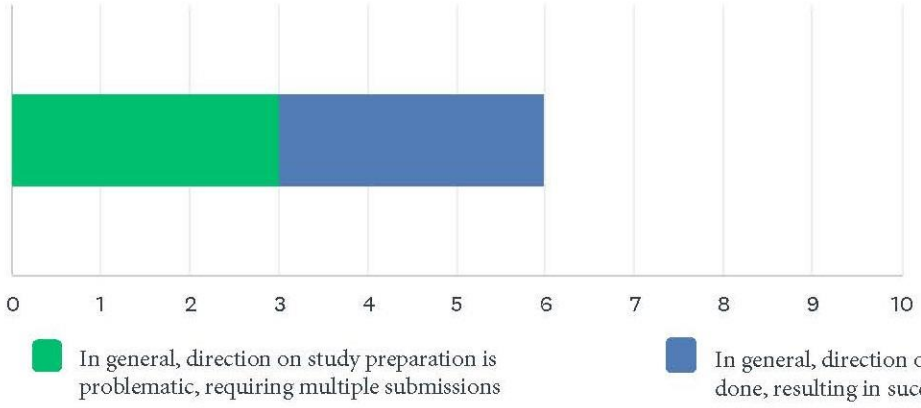
Q15 Hydrological Report

Answered: 9 Skipped: 0



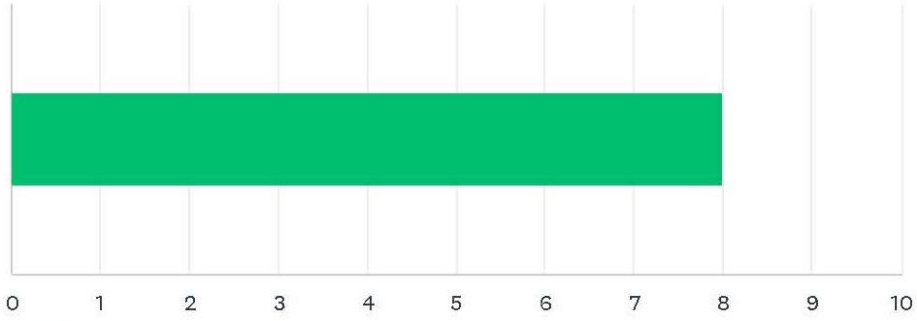
Q16 Illumination Study

Answered: 6 Skipped: 3



Q17 Master Environmental Servicing Study

Answered: 8 Skipped: 1



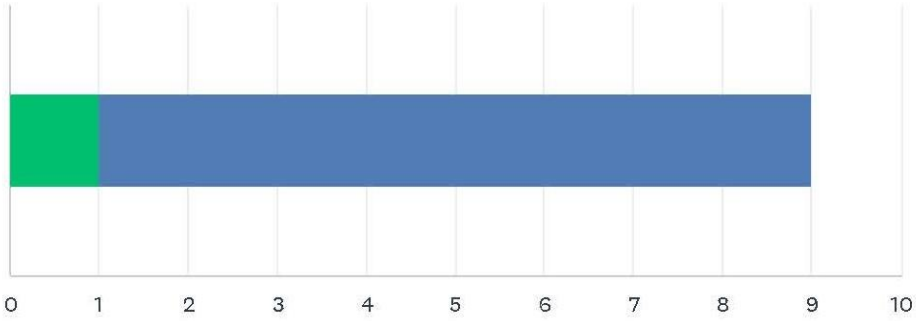
In general, direction on study preparation is problematic, requiring multiple submissions

In general, direction on study preparation is well done, resulting in successful first submissions

#	GENERAL COMMENTS
1	Per my comment on Block Plans above, MESS's / MESP's are incorporated into the Block Plan process, which again is not a requirement under the Planning Act and should be removed. MESS's / MESP's have evolved into an endless convoluted process that will be duplicated in subsequent Engineering approval processes.

Q18 Noise and Vibration Study

Answered: 9 Skipped: 0

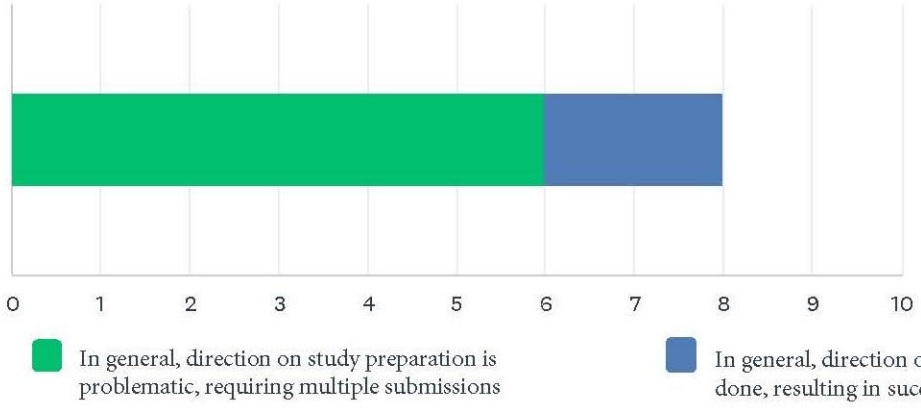


In general, direction on study preparation is problematic, requiring multiple submissions

In general, direction on study preparation is well done, resulting in successful first submissions

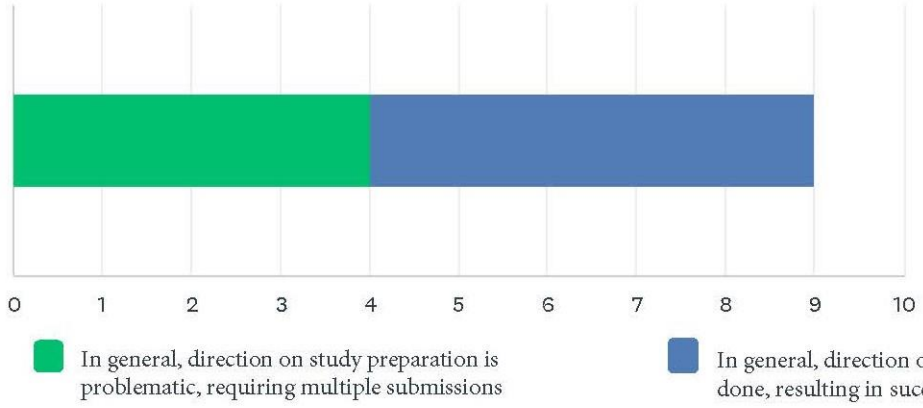
Q19 Parking Study

Answered: 8 Skipped: 1



Q20 Planning Justification Report

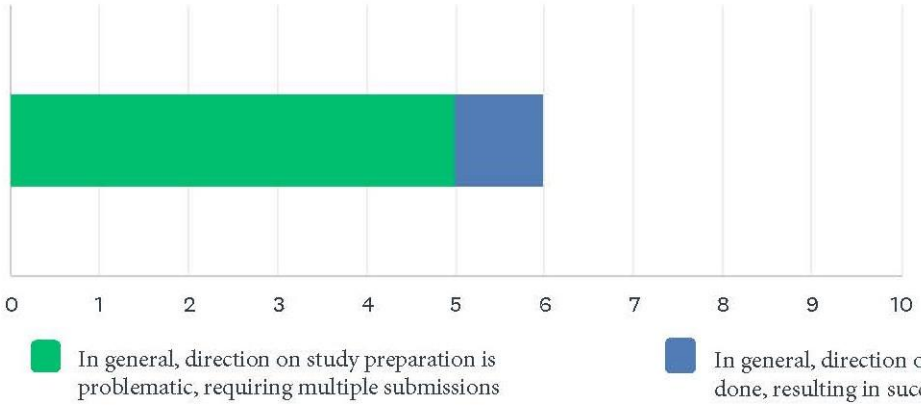
Answered: 9 Skipped: 0



#	GENERAL COMMENTS
1	Can be scoped and submitted as a letter rather than a report.

Q21 Retail and Service Needs Study

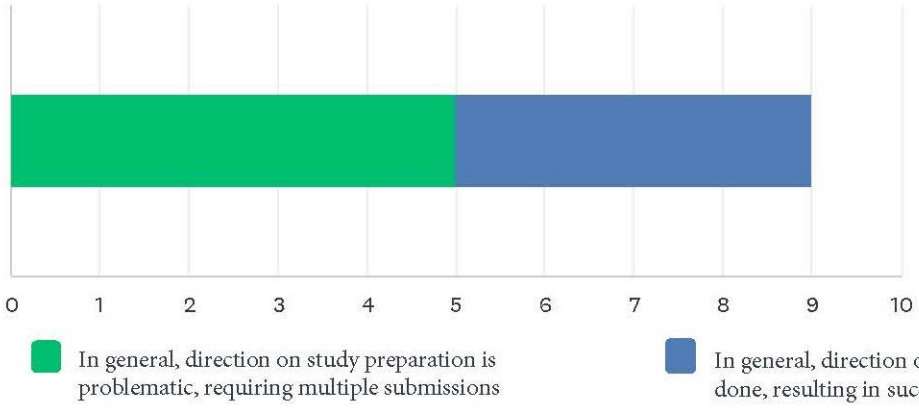
Answered: 6 Skipped: 3



#	GENERAL COMMENTS
1	Need to be requested when absolutely required.

Q22 Stormwater Management Report

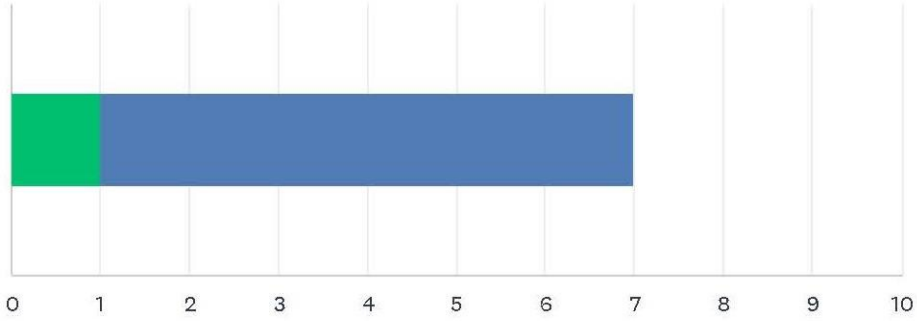
Answered: 9 Skipped: 0



#	GENERAL COMMENTS
1	Should be scoped for Planning submissions and then submitted in more fulsome form with Engineering submissions.

Q23 Sun/Shadow Analysis

Answered: 7 Skipped: 2



In general, direction on study preparation is problematic, requiring multiple submissions

In general, direction on study preparation is well done, resulting in successful first submissions

Q24 Transportation Demand Management Plan

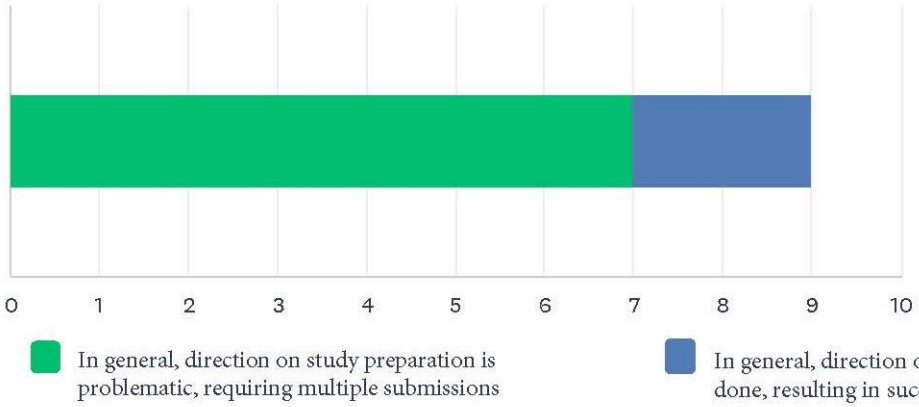
Answered: 9 Skipped: 0

In general, direction on study preparation is problematic, requiring multiple submissions

In general, direction on study preparation is well done, resulting in successful first submissions

Q25 Transportation Mobility Plan

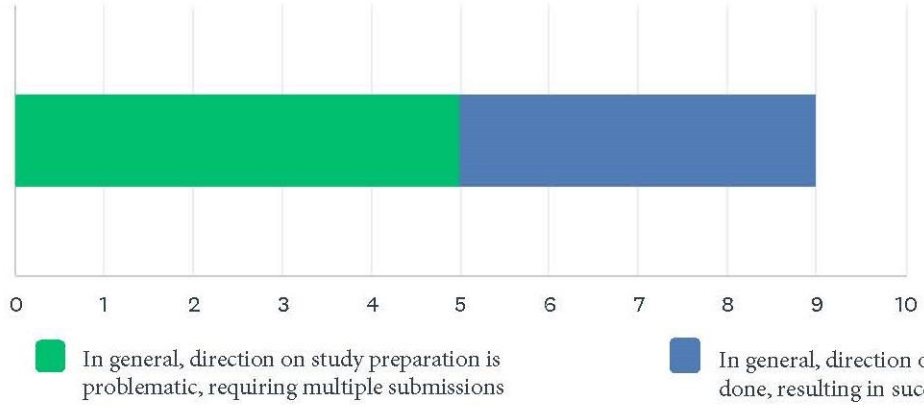
Answered: 9 Skipped: 0



#	GENERAL COMMENTS
1	Why are these required?

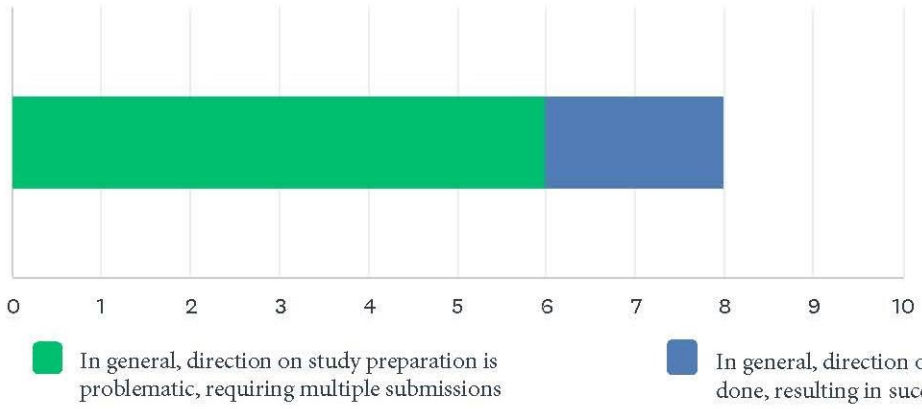
Q26 Tree Inventory & Preservation Plan

Answered: 9 Skipped: 0



Q27 Urban Design and Sustainability Brief

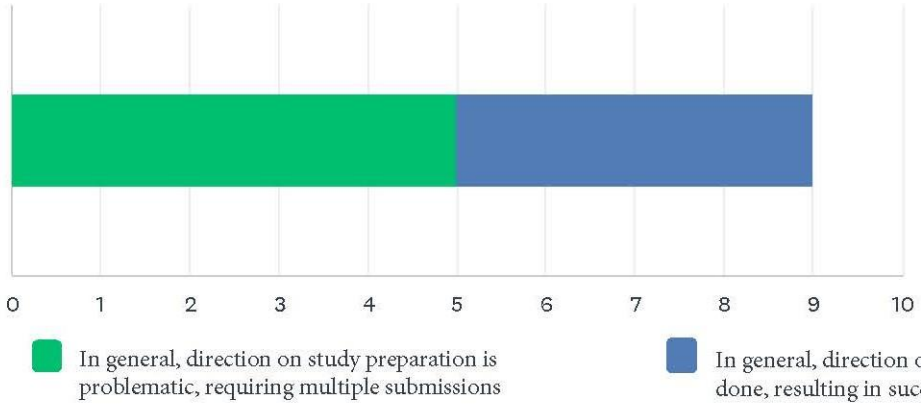
Answered: 8 Skipped: 1



#	GENERAL COMMENTS
1	As per Architectural Design Control, there are many "fingers in the collective pie". A subjective process that is left up to the personal taste of individual City staff. I believe that Bill 23 has eliminated the Urban Design as of the Nov. 28, 2022 being the date of Royal Assent and will be reinforcing the OBC with respect to Sustainability.

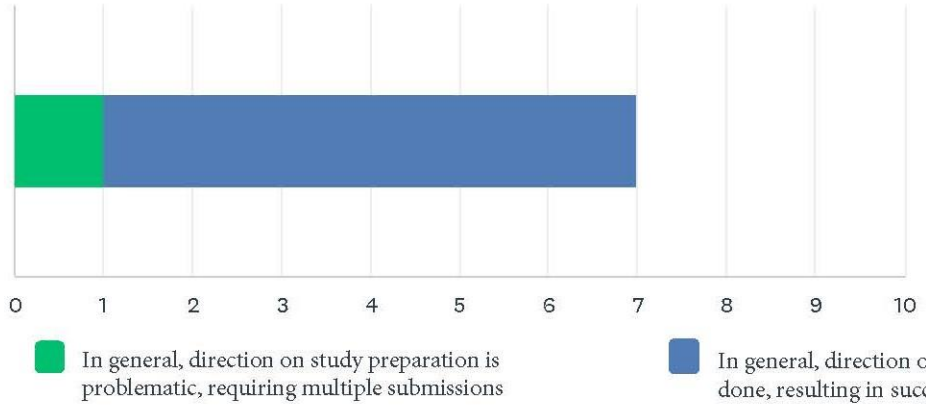
Q28 Water Budget and Conservation Plan

Answered: 8 Skipped: 1



Q29 Wind Study

Answered: 7 Skipped: 2



#	GENERAL COMMENTS
1	Need to be requested when absolutely required.

Q30 Any final thoughts, comments, best practices etc that you would like to offer with respect to the concept or content of the common Terms of Reference that municipalities within the Region of York are developing?

Answered: 6 Skipped: 3

#	RESPONSES
1	Preparing consistent Region wide TORs is a great initiative. The bigger issue is implementation and interpretation. Once the TORs are prepared, their need to be training to ensure consistent application of the the reports resulting from the TORs. The TORs need to be clear and concise, and a plan implemented to ensure they are quickly revised as policies / requirements change.
2	Ensuring that the right level of detail is requested at the proper time in the process. Requiring too much detail too early can be problematic and create too many revisions during the review process. While standard terms of refence are nice, also having a set of standards for when the study process is complete or what is expected as the outcome of a study is also needed.
3	Most of the report requirements have ballooned in the breadth and amount of information required at the Planning stages. We need to "right size" and scope the requirements for what is absolutely needed to facilitate high level planning decisions. Always reverting to antiquated checklists is not the way to move things forward in an efficient manner.
4	Transportation engineering and reporting has become increasingly difficult and it is because the stardard of traffic in York Region is already operating at a level not acceptable. New development should not be penalized as a result of current operating conditions.
5	NOTHING IS EVER APPROVED ON FIRST SUBMISSION!!
6	This survey was problematic in that generally the reaction to submissions and responses is in a range and not a binary response. It more has to do with the number of studies and the staff response to questioning the design and opinion of professionals that are accredited and have vast experience in their field of work. Staff response to comments is usually "deal with it" rather than taking some time to look at responses collectively and assess whether comments are justified. The number of supporting reports need to be reduced and / or put some trust in the professionals preparing the reports.

APPENDIX 4

Common Terms of Reference

Note: All reviewed and edited Terms of Reference have been included with the following exceptions

1) *Master Environmental Servicing Plan – edits are extensive and it is suggested that the Conservation Authorities be requested to assist with editing*
2) *Environmental Impact Assessment Study for Natural Heritage Features - edits are extensive and it is suggested that the Conservation Authorities be requested to assist with editing*
3) *Hydrology Study – it has been suggested that these requirements be consolidated within the Stormwater Management Study TOR*

About The Following Terms of Reference

These Terms of Reference were developed as a joint effort with participation by representatives from all York Region municipalities and the Region. The Terms of Reference are in widespread use across the Region, with local requirements added as prescribed by each municipality

The requirement for this study will be decided during Phase 1 (Mandatory Consultation) of the Collaborative Application Preparation (CAP) process.

If determined that this study is applicable, the study terms may vary depending on the nature of the proposal. Discussion and confirmation as to whether all criteria outlined within these Terms of Reference are appropriate for your development project, will also take place with you and in consultation with any relevant external agencies during Phase 1

In addition to these Terms of Reference, municipal departments and/or external agencies may require analysis of specific technical components that should be addressed in the study. Confirmation of additional technical requirements, and a checklist identifying detailed standards to be met, in turn may be provided. The extent of the checklist items will vary on the nature of the application and will be confirmed during the Phase 1 of the CAP process

Agricultural Impact Assessment

An Agricultural Impact Assessment (AIA) is used to evaluate the impact of a proposed development could have on the agricultural resource. It looks at whether or not a development proposal will adversely affect existing and future agricultural production or activities on a subject property or in the area surrounding it.

Required by Legislation

TBD

Who should prepare this?

An AIA must be completed by a Qualified Professional or Registered Professional Planner (RPP).

Why do we need this?

An AIA is required to:

- Identify possible adverse impacts on the agriculture
- Identify additional restrictions that may impact abutting agricultural operations as a result of the development (e.g., changes in MDS that would restrict expansion of an abutting agricultural operation)
- Identify and evaluate locational options for the proposed development and demonstrate that the proposed location is the preferred option in terms of minimizing the impact on agriculture

- Identify methods of removing or reducing any adverse impacts resulting from the development
- Address whether it is appropriate to provide “warning clauses” for the development, noting the presence of surrounding agricultural operations and if so, to make recommendations in that regard

How should this be prepared?

The AIA will review provide recommendations to protect agricultural land and to minimize adverse impacts on agriculture, both in the immediate vicinity of the development, and on the broader community

An AIA should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project name (if applicable)
- Applicant and owner’s contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Other concurrent approvals being sought, planning applications, permits
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Physical Resource Inventory (On-site and Surrounding Area)

- **Soils**: A detailed description, including mapping, of the soil composition of the site and surrounding area and the CLI agricultural capability ratings of the soils. A description of the inherent limitations to agricultural capability should be included Verification/refinement of existing soil capability mapping may be necessary.
- **Climate:** A general description of climatic features including Crop Heat Units, number of frost-free days, and the general climatic patterns of the area. A description of any microclimatic conditions particular to the site should be included (e.g. frost pockets)

- **Slope / Topography**: A general description of slope and topographic features including contour mapping of the site and surrounding area. If there are CLI notations regarding topography, an assessment of this information should be completed. A description of any limitations to agricultural capability based on slope should be included
- **Drainage:** A description of the details regarding drainage including existing or past improvements. If tile drainage exists a description of the system and its status should be provided. If no system exists the need for one and the potential improvements that could be achieved through tile drainage should be addressed

On-site Features

- **Past Farming Practices**: An outline of the history of the type and extent of agricultural operations on the site, including any recent changes
- **Type and Intensity of Existing Agricultural Production:** A description of current cultivation patterns, livestock operations, and any wooded or currently idle areas
- **Non-Agricultural Land Use On-site:** A description of on-site non-agricultural lands uses. Indicate conflicts with existing and potential on-site agriculture
- **Parcel Size, Shape, and Accessibility**: A description of fields on the site and their relationship to transportation routes and neighbouring farm properties vis-a-vis accessibility by farm machinery. Indicate limitations on farming efficiency posed by same
- **Existing Farm Management:** A description of land tenure and management on-site i.e. leased or owner operated, on or off-site residence, size of the total operation of which property is part
- **Capital Investment in Agriculture:** A description and evaluation of the degree of investment in land improvements, irrigation systems, tile drainage, rootstocks, facilities, buildings, machinery, etc.

Off-site Land Use Features

- **Surrounding Land Use Types**: A description of the location. type and intensity of surrounding agricultural and non-agricultural land uses and proposed land use changes up to a distance of 1 km from the property boundary of the site. These should be indicated on a map with details about the history of surrounding agricultural uses
- **Existing and Potential Constraints to On-site Agriculture**: An evaluation of constraints on agricultural production on-site arising as a result of existing and proposed non-agricultural uses in the area, including Minimum Distance Separation, nutrient management, traffic impacts, etc.
- **Regional Land Use, Lot and Tenure Patterns:** In order to determine the general character of the area which might influence the long-term agricultural potential of the site, an overall description of the broad rural area containing the site, including the extent of the area considered, a description of the fragmentation and tenure (absentee, non-farm) characteristics, non-agricultural land uses, the general agricultural (soil and macroclimatic) capability, and a review of non-agricultural commitments in the pertinent planning documents. Indicate the availability of agricultural support services to the site

Agricultural Viability

- An assessment of the viability of the site property as an agricultural operation on its own and in consolidation with a larger existing operation. The flexibility of the site for different types of agricultural operations should be considered in the viability assessment. This review should include considerations related to alternative agricultural operations that could occur into the future
- Impact on the viability of neighbouring agricultural operations resulting from increased restrictions that may occur as a result of the proposed development

Impacts and Mitigation Measures

Impact Assessment

- A description of the short- and long-term effects of the proposal on the agricultural community through the direct loss of agricultural resources including a description of the quantity and quality of land lost from agricultural production and the effects on existing or potential operations on the site
- A description of the potential effects of the proposal on existing and potential farming operations on surrounding lands. The discussion should consider Minimum Distance Separation criteria, Nutrient Management issues, the compatibility of the proposal with agricultural operations, and the effects on the flexibility of surrounding lands to accommodate both changes in types of farming, such as from cash crops to livestock, and expansions to livestock operations. Potential impacts on existing wells or impacts due to noise and increased traffic should be addressed.
- Consideration of the proposal's impact on the existing agricultural character of the general area including implications for land use, tenure or fragmentation patterns. The effect of the proposal as an intrusion in an agricultural area or on the continuity of the agricultural area should be considered
- Consideration of the potential cumulative impacts of this proposed development in the context of other decisions in the area

Alternative Location Analysis

- If the AIA is being completed to satisfy the policies of the PPS, a Provincial Plan or the Regional Official Plan to address the proposed removal of land from prime agricultural areas, an alternative location analysis should be completed to demonstrate that the proposed development location has the least impact on agriculture and to demonstrate the need, within an appropriate planning horizon, for additional land to be designated to accommodate the proposed use

Mitigative Measures

- A description of any measures that could be taken to reduce the impacts of the proposal on both on-site and off-site agriculture and the degree to which the impacts would be reduced (e.g., confining the development to areas on the site with poorer capability land and retaining as much good quality land in production as possible, establishing appropriate buffers on the development site so as not to impact the ability of abutting operations to expand)
- Identification of the impact of removal and/or mitigation measures the proponent proposes to undertake as part of the proposal
- Identification of any notices that could be included as conditions of development to ensure that the presence of surrounding agricultural operations are recognized and to advise future land owners that those operations may be subject to future expansion or shifts in production

Recommendations

The main findings from the study should be summarized including:

- Net potential impacts to agriculture resulting from approval of the proposed development after implementation of agreed to mitigation measures should be identified.
- Opinions regarding the implications for the Regional agricultural sector of proceeding with the proposal as described should be provided.
- If appropriate, mitigation measures to reduce any negative impacts on the agricultural sector should be proposed.
- Proposals for ongoing monitoring to assess future impacts should be included
- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- See any identified above

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

The scope of the AIA may vary depending on the scale of the development proposed and its potential impacts.

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Ministry of Agriculture, Food and Rural Affairs – Agricultural Impact Assessments Guidelines (draft 2018)

http://www.omafra.gov.on.ca/english/landuse/aia.htm

Notes

- If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating the changes and whether or not the recommendations and conclusions are the same.
- A peer review may be required. The cost of the peer review will be borne by the applicant.
- If the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered in complete and returned to the applicant.

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In addition to these Terms of Reference, municipal departments and/or external agencies may require analysis of specific technical components that should be addressed in the study. Confirmation of additional technical requirements, and a checklist identifying detailed standards to be met, in turn may be provided. The extent of the checklist items will vary on the nature of the application and will be confirmed during the Phase 1 of the CAP process

Archaeological Assessment

An Archaeological Assessment identifies and evaluates the presence of archaeological resources also known as archaeological sites. Archaeological resources or sites include the physical remains and contextual setting of any structure, event, place, feature, or object which, because of the passage of time, is on or below the surface of the land or water and is important to understanding the history of a people or place.

Required by Legislation

Ontario Planning Act
Ontario Heritage Act

Who should prepare this?

An Archaeological Assessment must be completed by a licensed archaeologist in accordance with the *Ontario Heritage Act*.

Why do we need this?

An Archaeological Assessment is required to on lands that hold archaeological potential to ascertain the presence or absence of archaeological resources. If these resources are present, and a proposed development is likely to impact the resources the archaeological assessment will evaluate the significance of these resources and outline measures to mitigate the impact of development on these resources.

The archaeological assessment will inform the review of an application by City Planning staff during Mandatory Consultation Phase 1 of the Collaborative Application Process

How should this be prepared?

An Archaeological Assessment divided into stages 1- 4, as per Ministry of Heritage, Sport, Tourism and Culture Industries 2011 Standards and Guidelines for Consultant Archaeologists for land-based archaeology

The study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
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- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

The Provincial Ministry of Heritage,Sport,Tourism and Cultural Industries has the primary responsibility pursuant to the Planning Act and the Ontario Heritage Act for matters relating to cultural heritage, including archaeological resources. Should it be determined that there is potential for impacts resulting from the approval of the development application, the applicant must notify the Ministry and carry out an archaeological assessment to the satisfaction of their satisfaction. No grading or other soil disturbances shall take place prior to the Ministry confirming that all archaeological resource concerns have met Provincial licensing and resource conservation requirements, including confirmation that the applicant has satisfied the Ministry's Indigenous Peoples Engagement protocol pursuant to their Technical Bulletin; "Engaging Aboriginal Communities in Archaeology"

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Context Plan
- Map of Study Area

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To be identified by the municipality

What other resources are there?

A list of qualified consultants can be found on

http://www.mtc.gov.on.ca/en/archaeology/archaeology_assessments.shtml

Draft Technical Bulletin Engaging Aboriginal Communities

http://www.mtc.gov.on.ca/en/publications/AbEngageBulletin.pdf

Mississaugas of the Credit First Nation Arch. Standards

Notes

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A peer review may be required. The cost of the peer review will be borne by the applicant.

If the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered in complete and returned to the applicant.

Should archaeological resources be found on the property during construction activities, all work must cease and both the Ontario Ministry of Heritage, Sport, Tourism and Cultural Industries, and City Cultural Heritage departments shall be notified immediately.

In the event that human remains are encountered during construction activities, the proponent must immediately cease all construction activities. The proponent shall contact the York Regional Police Department, the Regional Coroner and the Bereavement Authority of Ontario.

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Architectural Design Control Guidelines

Architectural Design Control Guidelines are a written and graphic manual providing direction regarding the achievement of built form and public realm.

The Guidelines are a combination of text, plans, illustrative sketches and photos, sections and comparative models or examples that inform the proponent, public and municipality about the built form, landscape and structures on private lands within new neighbourhoods.

The Guidelines are written for “Control Architect” to use in evaluating the design of buildings and associated landscapes within the area. in parts of the municipality where it is important for new buildings to blend with existing communities/neighbourhoods, to advance the emerging character of a new or redeveloping community/neighbourhood.

The Guidelines may be an alternative to individual site plans (for single lots and building types not normally processed through Site Plan Approval

Required by Legislation

TBD

Who should prepare this?

Architectural Design Control Guidelines are prepared and signed by an Urban Designer, licensed architect, landscape architect or Registered Professional Planner (RPP).

Why do we need this?

Architectural Design Control Guidelines are non-statutory planning tools. They are approved by the municipality and the landowner and are implemented through an Architectural Design Control Process that is managed by the municipality and paid for by the Applicant. Approval of the control architect will be a condition of the respective agreement between the city and the Applicant. They address built form matters and may exceed the provisions of the *Planning Act* by addressing architectural matters such as materials, colours and detailing in addition to siting and building massing issues. The Guidelines depend upon agreement between the City and the developer regarding the importance of a high quality of architectural design.

The Architectural Design Control Process can streamline future planning approvals by clarifying design expectations for development

Where a contiguous tract of land is divided into several subdivisions or development sites, use of a comprehensive set of Guidelines will be encouraged to achieve architectural consistency within a larger neighbourhood.

The Guidelines will be flexible to accommodate change as it occurs while maintaining intact the essential urban design ideas.

How should this be prepared?

Architectural Design Control Guidelines should at a minimum contain

Disclaimer: (if applicable)

Table of contents

Introduction

- Short description
- Scope and intent
- Terminology
- Site context
- Architectural Vision
- Design goals and objectives
- Land uses and concept plan
- Author name, title, qualifications, company name and appropriate stamp
- Guidance on the geographic limits of the surrounding area

Investigation/Evaluation/Direction

Structure Plan that identifies

- the approved lot and block plan lot and block numbers
- the visual public realm
- priority sites and other lots deserving special/enhanced treatment to support the overall design concept and proposed character, such as: corner lots, T-lots, lots requiring enhanced rear or flanking façade treatment, corner lot fencing and rear lot fencing

Built form principles per use

- Building siting and massing.
- Built form and siting relationships between different building forms types and site conditions (i.e., park, reverse lots, public walkway).

More detailed design direction per use for the following (if applicable):

- Elevations: consistency, architectural style, coordination of models, colours and repetition, special elevations (gateway, corner lots, reverse lots, park lots, etc.)
- Entry features (porches, porticos)
- Windows and doors
- Garages and driveways
- Roofs and chimneys
- Materials, architectural detail and colours of roofs, walls and foundations
- Utilities

Landscape and street scape (per use)

- Pedestrian and vehicular access
- Fences and garden walls (visible to the public realm)
- Landscaping
- Lighting
- Signage

Additional built form matters may be included to address contextual and site-specific conditions. These matters may include, but are not limited to,

- Cultural or natural heritage
- Noise attenuation
- Height restrictions
- Topographic conditions

Implementation

- Design review and approval processes
- Role of the City
- Role of the Control Architect
- The developer and the builder’s responsibility

Drawings, Illustrative Supporting Diagrams

- Provide an outline of the supporting studies submitted (eg environmental, Urban Design Briefs)

What else should we know?

The scope of work should be discussed with the community planner, urban designer and or other staff or agencies as part of the pre-consultation process. Modifications may be required to address the requirements of individual neighbourhoods and districts.

A landowner may choose to use a “Control Architect Process” to achieve the City’s built form objectives and control the quality.

A “Control Architect” administers the Council approved Architectural Design Control Guidelines on behalf of the municipality and the developer. The “Control Architect” is an independent professional responsible for conducting a comprehensive review of each development proposal to ensure that siting, built form, materials, colours and landscaping, among other things, follow the approved Guidelines for each phase. This is particularly important on large sites that will take many years to complete. To avoid potential conflict of interest, it is important that the Control Architect does not offer design services to any development within the area of the architectural design guideline..

Architectural Design Guidelines will form part of a subdivision agreement or master site plan agreement.

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

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To be identified by the municipality

What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Ontario Association of Architects

https://oaa.on.ca/

Ontario Association of Landscape Architects

https://www.oala.ca/

Notes

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In addition to these Terms of Reference, municipal departments and/or external agencies may require analysis of specific technical components that should be addressed in the study. Confirmation of additional technical requirements, and a checklist identifying detailed standards to be met, in turn may be provided. The extent of the checklist items will vary on the nature of the application and will be confirmed during the Phase 1 of the CAP process

Block Plan/Comprehensive Development Plan

A Block Plan/Comprehensive Development Plan provides a conceptual and comprehensive idea of development on the block and a framework to evaluate proposed development.

It will inform Official Plan Amendments, rezoning, plans of subdivision and other planning processes. The Block Plan will illustrate and analyze the development proposal in both existing and planned context for an area larger than the development site itself, regarding the layout and design of public streets and other pedestrian and cycling connections, parks and open spaces and built form issues such as building type, location, organization and massing.(Comment from Randall Roth – add land use)

Required by Legislation

TBD

Who should prepare this?

A Block Plan must be prepared and signed by a Registered Professional Planner(RPP), Registered Architect, Professional Engineer, or Registered Landscape Architect.

Why do we need this?

A Block Plan is required to:

- Show how the physical form of the proposed development fits within the existing and planned context Show how the proposed development conforms to the policies of the Official Plan and implementation tools including site specific and other guidelines
- To guide development on
    - Multiple parcels of land
    - Large development sites
    - Sites with two or more buildings, on-site park dedication, and/or a new public street(s).
    - Sites with a context of large open spaces and few public streets Apartment Neighbourhood sites and mixed-use shopping centres.
    - Sites adjacent to heritage or natural features, ravines, woodlots, the waterfront, or public parks.
    - Sites with proposed new, alterations to or adjacent to a higher order transit station.
    - Sites where the development potential on adjacent properties may be impacted by or could be integrated into the proposed site.

How should this be prepared?

A Block Plan/Comprehensive Development Plan will review provide direction for development taking into consideration existing and proposed context to ensure orderly development and conformity with the Strategic Plan, Official Plan and relevant guidelines.

A Block Plan/Comprehensive Development Plan should at a minimum contain the following:

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development statistics (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing

- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards including setbacks/buffers and/or restoration areas as applicable.

Investigation/Evaluation

Items to be addressed in the Block Plan/Comprehensive Development Plan include but are not limited to the following:

- The existing topography and a conceptual grading plan
- The location of natural features including mature trees and vegetation and strategies to protect them
- The layout and design of existing and proposed streets in plan and section including dimensions for sidewalks, trees and other street furniture in order to achieve Complete Streets, complete communities and ROP policies
- The location of existing and required parks and trails
- The location of existing and proposed open spaces school yards and other accessible open spaces
- The pedestrian circulation network including public sidewalks and other walkways through existing and planned parks, accessible open spaces including midblock connections
- The location of existing and future public destinations including parks, schools, transit, community services and retail streets
- Existing and proposed cycling routes, on public and private land
- The location of existing or potential cultural heritage resources and strategies to protect them
- Existing and possible locations for public art
- The pattern of existing and proposed building types
- The layout of development parcels including setbacks and building entrances
- Proposed service areas including public lanes, service courts, shared driveways, ramps and loading areas
- Building massing including heights, step-backs and tall building elements
- Density and heights illustrating shadow impacts, transition in scale between areas of differing intensity of use and spacing dimensions between buildings on a block
- Phasing of development

Impacts and Mitigation Measures

- A summary of the major considerations that informed the plan to address any opportunities, constraints, plans and policies

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Provide a list of the supporting studies that informed the plan

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

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What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

It is important that the study not be finalized until the results of other studies are completed such as but not limited to Environmental Impact Study, Environmental Site Assessment, traffic, heritage any hazard related studies, servicing, and grading.

The Block Plan/Comprehensive Development Plan should be included into the Planning Justification Report.

What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

Notes

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating the changes and whether or not the recommendations and conclusions are the same.

A peer review may be required. The cost of the peer review will be borne by the applicant.

f the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered in complete and returned to the applicant.

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Community Services and Facilities Study

A Community Services and Facilities (CS&F) Study is used to assist in the identification of current and future levels of social infrastructure such as schools, libraries, community centres, parks, trails and social services required to support the health, safety and wellbeing of local residents (matters pertinent to good planning).

Required by Legislation

TBD

Who should prepare this?

A Community Services and Facilities Study must be completed by a Registered Professional Planner (RPP).

Why do we need this?

A Community Services and Facilities Study is required to:

- Determine the general health of local community infrastructure
- Identify the impact, necessary improvements or refocusing brought about by changing or growing demand within a community
- Determine the level of service for community services and facilities including supply and access to parkland and outdoor recreational facilities and amenities.

How should this be prepared?

A CS&F Study will review social, economic and demographic information in light of existing and projected supply and demand of community services and facilities. CS&F studies will provide a detailed inventory of all community services and facilities within a prescribed study area as well as a review of available capacities and levels of service within those services and facilities in light of planned development in the area.

A Community Services and Facilities Study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, buildings, structures, roads, active transportation facilities, parks, natural areas, buildings, parking areas
- Process steps/approvals required (i.e., zoning, site plan, consent, condominium)
- Other concurrent approvals being sought, planning applications, permits including for surrounding lands
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Demographic profile of the study area including:

- Population data, to be compared to municipal-wide level data including current population by age and sex, population change from the last Census, population projections
- Family composition, to be compared to municipal-wide level data including families by type, number of children; private households by type and size; marital status of residents in the study area

- Housing to be compared to municipal-wide level data, including occupied private dwellings by structural type, period of construction and tenure
- Level of development activity in the study area listing type of development, tenure, GFA, height, number of units, type of bedrooms, phase of development
- Immigrant population, to be compared to municipal-wide level data including population by period of immigration, recent immigrants by selected countries of birth for the most recent census period (top five countries), number of immigrants in neighbourhoods in the study area and number and type of languages spoken, population mobility status
- Labour Force compared to municipal-wide level data including labour force by occupation and labour force by industry
- Socio-Economic characteristics (highest and lowest level of education attained by residents in the study area, labour force participants, average income, and income range).
- Projected population ramp up to build out based on development phasing

Inventory of services and facilities that exist in the study area for example:

- Elementary and secondary schools
- Public libraries
- Childcare centres
- Community and recreation centres
- Community indoor facilities
- Parks and Open Space
- Multi-use recreational trails
- Outdoor public recreation facilities
- Arenas
- Swimming pools
- Places of Worship
- Social services
- Other publicly accessible community meeting or recreation space
- Private recreational facilities and amenities

Impacts and Mitigation Measures

- Identify any pressures on the social infrastructure and what is needed to close the gap informed by local policies, guidelines, or master plans and associated provision standards
- Identify methods or tools to address shortfall.

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed to address short and long term provisions
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Maps of services and facilities serving the study area in which the development application is located including relevant service catchments
- Identifying provision standards, as per local policies, guidelines, or master plans and benchmarked against existing city-wide and community-wide provisions; and a gap analysis based on recommended provision standards.
- Profiles of services and facilities, for example, programs offered, size of facilities, demand and capacity of facilities and programs, and who is served by the service or facility (age groups, gender), as well as contact information for all services and facility staff contacted during the study. The study should discuss the ability of the service or facility to accommodate growth, barriers if any, and any new services that may be required as a result of the proposed development.
- Additional information from municipal departments and other large public agencies, housing, public health, libraries, parks and recreation, School Boards, and relevant private sector providers as may be required.
- Highlights of existing studies and reports that may be available for the area

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

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What other resources are there?

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Notes

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A peer review may be required. The cost of the peer review will be borne by the applicant.

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If determined that this study is applicable, the study terms may vary depending on the nature of the proposal. Discussion and confirmation as to whether all criteria outlined within these Terms of Reference are appropriate for your development project, will also take place with you and in consultation with any relevant external agencies during Phase 1

In addition to these Terms of Reference, municipal departments and/or external agencies may require analysis of specific technical components that should be addressed in the study. Confirmation of additional technical requirements, and a checklist identifying detailed standards to be met, in turn may be provided. The extent of the checklist items will vary on the nature of the application and will be confirmed during the Phase 1 of the CAP process

Conservation Plan for Heritage Resources

The objectives of a Conservation Plan for Heritage Resources (Conservation Plan) are to identify the cultural and historic significance of a site and to set out a plan to manage and conserve the heritage values, attributes, and integrity of that site. The conservation plan examines the long-term planning of a cultural resource and should determine how to retain its significance in any future use, alteration, repair, or development.

Required by Legislation

TBD

Who should prepare this?

A Conservation Plan must be prepared by a qualified professional such as a heritage consultant, architect, landscape architect etc ~~and/or engineer~~ licensed to practice in the Province of Ontario ~~or heritage consultant~~ and specializing in the subject of heritage resource and the work being proposed .

Conservation Plans are usually a multi-discipline exercise whereby all consultants on the project must demonstrate accredited professionalism, experience, and knowledge in their chosen field of expertise.

Why do we need this?

A Conservation Plan is required to ensure the long-term protection of heritage resources.

How should this be prepared?

A Conservation Plan should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Purpose of the-Plan
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats such as: number of units, site area, type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas, landscape features such as trees, fences, berms, pathways, ponds and views and vistas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

1. Description of the Resource
    - Detailed documentation of the resources (sketches, measured drawings and photos)
    - Description of the resource and existing character of the site, including its context and neighbourhood
    - History of the resource and its evolution over time, highlighting changes (preferably graphical)
    - Current management (activities, costs, budget, operations), ownership, responsibilities and roles of other organizations and agencies

2. Significance
    - Statement of Significance, including a list of character-defining elements
    - Include the designation bylaw, if applicable
    - Heritage status (listing, designation, easements, heritage conservation district)

3. Planning Policy Framework
    - Regulatory context of the heritage resource with attention to approval processes
    - Local planning and policies (zoning and official plans)

4. Condition of the Resource
    - Condition assessment of the resource/attributes with an inventory of prioritized deficiencies
    - Discussion and analysis of mechanisms of deterioration
    - A discussion of use (historic, current and proposed) as it relates to the conservation of the heritage resource

5. Issues
    - List key issues pertaining to the resource, identifying opportunities and restrictions (e.g. development, financial and capital needs, public access requirements)
    - Conservation constraints and requirements of users and owners
    - Planning issues relating to the place

6. Building System and Legal Considerations
    - Statement to explain the building and site use from a practical, logistical and legal perspective
    - Input from structural, mechanical, electrical, planning, geotechnical, trades, and all other required fields of expertise to ensure the project is viable and sustainable
    - Building and site system review may include:
        - Site Work (e.g. landscaping, drainage, servicing)
        - Trees, shrubs, other plantings
        - Archaeological concerns and mitigation
        - Structural elements (e.g. foundation, load bearing) o Building Envelope (roof, wall cladding, window type)
        - Ontario Building Code
        - Accessibility
        - Mechanical, Plumbing, Electrical o Finishes and Hardware
        - Fire Safety and Suppression
        - Environmental Considerations
        - Lighting
        - Signage and Wayfinding
        - Security
        - Legal Considerations (e.g., easements, encroachments, leasing, etc.)
    - If necessary, the building systems may be addressed in an Appendix

Description of Conservation Approach

1. Aims and Goals

    - Overall conservation strategy with regard for the *Standards and Guidelines for the Conservation of Historic Places in Canada*;

- Proposed remedies, interventions and implementation including rationale for selection of period of restoration and for new interventions. This should be organized and described by building elevation.
- Statement as to the recording, inventory and disposition/retention of moveable cultural heritage resources (e.g., artifacts, archival material, salvaged material) and its incorporation into the conservation project

2. Work Plan
   - Timeline to describe, in chronological order, to meet the objectives and goals
   - Statement as to specialized trades or skills that will be required to complete the work
   - Long term and short-term maintenance schedule
   - Monitoring schedule, process and identify those responsible for monitoring

Recommendations

- Summary and conclusions of the Conservation Plan including any studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conclusions that should form part of the decision on the matter

Drawings and Supporting Information

The Appendices **may** include the following, as appropriate: Bibliography

- Chronological history
- Archaeologicaly assessment report
  or Stage 1 and 2 Archaeological Assessment reports
- Documentation of the character-defining elements
- Schedule of previous reports and studies
- Detailed building condition report
- Site plan(s) (current/proposed)
- Architectural drawings (current/proposed)
- Arborist's report
- Other reports as needed

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

Canadian Association of Heritage Professionals (CAHP)

https://cahp-acecp.ca/

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

Notes

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating changes to the recommendations and conclusions.

A peer review may be required. The cost of the peer review will be borne by the applicant.

If the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered incomplete and returned to the applicant.

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Cultural Heritage Impact Assessment

A Cultural Heritage Impact Assessment determines if any cultural heritage resources may be adversely impacted by a specific proposed development or site alteration and recommends an overall approach to the conservation of the heritage resource. Cultural Heritage resources may refer to built heritage or cultural heritage landscape. Archaeological resources will be dealt in accordance with the *Ontario Heritage Act*.

This includes heritage resources previously identified and those on or adjacent to the subject property and development or site alteration. Even small alterations to a resource over time can dramatically affect its cultural heritage value.

Depending on the complexity of the application, the information requirements may be addressed in a letter format or a more comprehensive report.

Required by Legislation

TBD

Who should prepare this?

A Cultural Heritage Impact Assessment shall be prepared and signed by a qualified heritage specialist such as a heritage planner, heritage architect and/or heritage landscape architect, with demonstrated knowledge of accepted heritage conservation standards, and experience with historical research and identification/evaluation of cultural heritage value.

Applicants may refer to the Canadian Association Heritage of Professionals (CAHP) at https://cahp-acecp.ca/ which lists members by their specialization. Please note that not all CAHP members may be qualified to complete a heritage impact assessment.

Consideration will be given on a case-by-case basis to non-CAHP members who have specialization in applicable areas, depending on the types of heritage resources being assessed.

All reports and drawings must be stamped and/or signed and dated by a qualified professional, licensed in the Province of Ontario.

Why do we need this?

A Cultural Heritage Impact Assessment is required to

- Determine compliance with relevant cultural heritage policies
- Assist staff with their analysis and report preparation
- To identify any special conditions of approval

How should this be prepared?

A Cultural Heritage Impact Assessment should at a minimum contain

Introduction

- An Executive Summary
- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Photographs of the site
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards and a perspective drawing of proposal noting how it relates to the heritage resource

- A description of how the heritage resource(s) of the property will or will not be incorporated into the proposal (such as whether the building will be restored and adaptively reused or whether the building will be relocated to a different site)

Investigation/Evaluation

Heritage Context

- A written description of the property, its location and surroundings including the heritage status of the development site and adjacent properties

Research and Analysis

- A comprehensive review of the history of the property's development as documented in pictorial and textual records and as observed in as-found evidence
- A chronological history including ownership and tenancy, development of any structures, such as additions, removals, conversions, etc.
- An evaluation of the cultural heritage significance of the site in terms of its history, architecture and local context
- Broader historical context should also be addressed- how the property fits into the community or the municipality
- The reproduction of any pictorial records found, including relevant maps, atlases, drawings, photographs, permit records, land title records, assessment rolls, etc.

Statement of Cultural Heritage Value or Interest

- A statement of cultural heritage value or interest and description of heritage attributes of the cultural heritage resource(s), in accordance with Ontario Regulation 9/06 and Regulation 385/21 (new requirements for Statement of Significance). It should be noted that this evaluation is only required in absence of a municipally-prepared Statement of Significance
- This statement will be informed by current research and analysis of the site as well as pre-existing heritage descriptions (as may be found in an existing Statement of cultural heritage value or interest within a designation by-law on the property)
- This statement will be written in a way that does not respond to or anticipate any current or proposed interventions to the site
- That the assessment may not substitute alternate heritage values or character for those that have been approved or endorsed by the City

Assessment of Existing Conditions

- A comprehensive written description of the physical condition of the structures on the site, including their exterior and interior
- Current photographs of the property, including:
    - views of the area surrounding the property to show it in context with adjacent properties
    - exterior views of each elevation of each building
    - views of the property including all significant landscape features

- interior views of each room in each building
- close-up views of all significant interior and exterior heritage features
- If the property is currently vacant, how long it has been vacant and what, if any security measures have been applied to protect the property

Policy

- Municipal heritage policies and their applicability should be included
- Relevant municipal heritage policy, as it relates to the heritage resources(s). i.e. OP policy, Secondary Plans, Area and Site Specific Policies. Policies/Guidelines from an HCD Plan, etc. should be included

Impacts and Mitigation Measures

Impact of Development on Heritage Attributes

- A discussion of the potential impacts the proposal may have on the site's heritage resource attributes
- Negative impacts on cultural heritage resources may include
  - destruction of any, or part of any, significant heritage attribute
  - impact of construction on the cultural heritage resource (vibration, shoring, etc)
  - alteration that is not sympathetic to the heritage attribute
  - shadows created by new development that alter the appearance of or change the viability of a heritage attribute
  - isolation of a heritage attribute from its surrounding environment, context or significant relationship
  - direct or indirect obstruction of significant views or vistas
  - a change in land use which negates the property's cultural heritage value
  - land disturbances such as a grade change that alters soils and drainage patterns that adversely affect a cultural heritage resource

Considered Mitigation and Conservation Strategies

- Recommended mitigation measures to minimize impact on identified heritage attributes.
- Discussion of considered alternatives, and a rationale for the preferred development option.
- A description of and rationale for the primary conservation treatment(s) based on the Parks Canada Standards and Guidelines for the Conservation of Historic Places in Canada.
- An itemized and detailed analysis of and rationale for all alterations and interventions proposed affecting the cultural heritage value and attributes of each existing, potential and adjacent heritage property using all applicable guidelines in the Parks Canada

- Standards and Guidelines for the Conservation of Historic Places in Canada. Strategies should have consideration for relevant cultural heritage policies (Provincial Policy Statement; Official Plan; Heritage Conservation District Plan, Designation By-law, if applicable)

- Recommendations for additional studies to be undertaken related to, but not limited to:
    - restoration specifics
    - design guidelines,
    - interpretation and commemoration
    - lighting
    - signage
    - landscaping
    - structural analysis
    - additional written and photo documentation prior to demolition
    - conservation plan
    - long-term maintenance plan

Recommendations

- Summary and conclusions and how they impact the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- A list of primary and secondary sources consulted
- A summary of the author's qualifications
- Include the applicable drawings of the development affecting the cultural heritage resource(s)

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

Some forms of development and site alteration may also require an Archaeological Assessment which is a separate terms of reference.

It is expected that the preferred protective and mitigative measures will be consistent with recognized standards for heritage conservation, including:

- The Ontario Ministry of Heritage, Sport, Tourism and Culture Industries *Standards and Guidelines for Conservation of Provincial Heritage Properties*
- The Ontario Ministry of Heritage, Sport, Tourism and Culture Industries *Eight Guiding Principles in the Conservation of Historic Properties*
  The Ontario Ministry of Heritage, Sport, Tourism and Culture Industries *Conservation Principles for Land Use Planning*

- Well-Preserved: The Ontario Heritage Foundation's *Manual of Principles and Practice for Architectural Conservation*
- The Parks Canada *Standards and Guidelines for the Conservation of Historic Places in Canada*
- *The Appleton Charter for the Protection and Enhancement of the Built Environment*
- *The International Charter for the Conservation and Restoration of Monuments and Sites (the Venice Charter)*

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What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Canadian Association Heritage Professionals (CAHP) at

https://cahp-acecp.ca/

Notes

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Environmental Site Assessment – Phase One & Two

involves the study of a property to determine if contaminants are present and, if so, the location and concentration of these contaminants. In addition, an ESA includes the completion of a report documenting the study results. A Phase One Environmental Site Assessment is an assessment of property conducted in accordance with the regulations, by or under the supervision of a qualified person, to determine the likelihood that one or more contaminants have affected any land or water on, in or under the property.

A Phase One Environmental Site Assessment requires the qualified person to:

- identify any potentially contaminating activity in the phase one study area, including the phase one property
- identify areas of potential environmental concern on the phase one property
- determine if a phase two environmental site assessment is needed (for some types of property uses and circumstances, a phase two environmental site assessment is mandatory)

A Phase One Environmental Site Assessment needs to meet all requirements of O. Reg.153/04, including the requirements of Schedule D of the Regulation.

A Phase Two Environmental Site Assessment is an assessment of property conducted in accordance with the regulations, by or under the supervision of a qualified person, to determine the location and concentration of one or more contaminants in the land or water on, in or under the property.

A Phase Two Environmental Site Assessment require the qualified person to:

- determine the location and concentration of one or more contaminants
- take actions to reduce the concentration of one or more contaminants if a standard has been exceeded and/or complete a risk assessment to develop property specific standards that are safe for the intended use
- confirm that the site meets the applicable site condition standard or a standard specified in a risk assessment

A Phase One Environmental Site Assessment needs to meet all requirements of O. Reg.153/04 including the requirements of Schedule E of the Regulation.

A Record of Site Condition is a formal submission, together with all supporting documentation, acknowledged by the Ministry of the Environment as certified by a qualified person, indicating the environmental conditions of the site and its suitability for a proposed use.

Each record of site condition:

- is based on the results of one or more environmental site assessments
- is conducted by a qualified person
- may involve the completion of a risk assessment and the development of property specific standards
- a qualified person must certify that the property meets the applicable site condition standard or a standard specified in a risk assessment for the intended use
- is filed to the Environmental Site Registry once regulatory requirements are met

Required by Legislation

O Reg 153/04

Provincial Legislation regulating Brownfield Development

Municipal Policies regulating the Conveyance of Land

Who should prepare this?

A qualified person as listed in Ontario Regulation 153/04 (O. Reg. 153/04) Part II “Defined Persons” (see section on “what other resources are available”) must complete a Phase One and/or Phase Two ESA.

Why do we need this?

The primary objective of these studies is to determine if site remediation and cleanup is required and ensure that contaminated land is restored to an environmental condition suitable for the proposed land use so that water resources, human health, and ecological health are protected.

The Environmental Site Screening Questionnaire, Phase I and II Environmental Site Assessment and a Record of Site Condition are intended to:

- Provide a history of past uses on the site
- Provide information regarding potential contamination on the site
- Determine if contamination is present
- Determine if a proposed land use is suitable for the site
- Determine if site remediation is required

Assist staff with their analysis and report preparation

How should this be prepared?

An Environmental Site Assessment should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Phase One ESA

- **Criteria and Method:** Follow records review, site reconnaissance and reporting requirements for Phase One Environmental Site Assessments as prescribed under Ontario Regulation 153/04 under Part VII and Schedule D.
- **Assessment/Analysis:** Identify all Potentially Contaminating Activities and Areas of Potential Environmental Concern based on former and current uses within the study area of the subject property. Include a Phase One Conceptual Site Model, as prescribed in O. Reg. 153/04.
- **Conclusions:** Qualified Person makes a determination and provides supporting documentation and rationale on whether a Phase Two ESA is required or whether a Record of Site Condition can be filed based on the findings of the Phase One ESA.

Phase Two ESA

- Provide a summary of the Phase One ESA findings and any previous environmental investigations.
- **Criteria and Method:** Follow site investigation and reporting requirements for Phase Two Environmental Site Assessments as prescribed under O. Reg. 153/04 under Part VIII and Schedule E.
- **Assessment/Analysis**: Compare laboratory data of each Contaminant of Concern (COC) from all collected soil and groundwater samples (and other media, where applicable) from each Area of Potential Environmental Concern on the subject property against the applicable Generic Standards for the intended use and assess whether all COCs have been effectively delineated both horizontally and vertically. Include a Phase Two Conceptual Site Model, as prescribed under O. Reg. 153/04. If remedial activities were undertaken, then summarize the remedial actions and confirmation sampling performed.
- **Conclusions:** Summary of the location and concentration of COCs in comparison to the applicable Generic Standard(s) for the intended use(s). The Qualified Person makes a determination whether or not the subject property meets the applicable Generic Standards as of the certification date of the report. Where it does not meet the applicable Generic Standards, further delineation of one or more COCs may be recommended on the subject property and/or off-site, and/or proceeding with the development of a remedial action plan to properly address contaminated material.

Impacts and Mitigation Measures

- If a Phase Two ESA report indicates that contaminants are present on the property that exceed the applicable site condition standards, then a Qualified Person will need to prepare a Remedial Action Plan to properly address the contamination to meet the applicable standards. A Remedial Action Plan may include the use of a Risk Assessment either as an alternative to, or in combination with, physical remediation methods to remove and/or treat contamination in soil and/or groundwater.

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Site Location Map
- Plan of Survey
- Topographic Map (Ontario Base Map series)
- Photographs of Subject Property and Surrounding Area
- Environmental Database Records
- Aerial Historical and Current Photographs
- Fire Insurance Plans
- Chain of Title Records
- Environmental Reports
- Regulatory and/or Site Operating Records
- Conceptual Site Model
-

Phase Two

- Sampling and Analysis Plan
- Field Logs (boreholes, monitoring wells, test pits, sediment sampling, soil vapour, etc.)
- Laboratory Analytical Results and Chain of Custody
- Residue Management
- Survey Plan of Phase Two Property
- Remediation Report and Records (where remedial activities undertaken)
- Where this TOR differs from applicable legislations, the legislation prevails. Furthermore, the legislation may be amended/updated from time to time. The applicants need to ensure the most updated legislation is followed.

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

- Please note that a “Phase Oneand Two ESAs” that is prepared following the Canadian Standards Association (“CSA”) standardZ768-01 (2016), is not regulated under provincial legislation, cannot be used to file a Record of Site Condition(“RSC”), and will not be accepted for a land dedication.
- All Phase One and Two ESA reports submitted to the municipality must be accompanied by either an Environmental Clearance and Letter of Reliance to the satisfaction of the municipality

Any Phase One or Two ESA reports submitted for land dedications that exceed 20 months will not be accepted, unless a Record of Site Condition has been filed for the property based on the report(s) on the Environmental Site Registry. For lands that will not be dedicated to the municipality, Phase I and II ESA reports older than 5 years will not be accepted.
A Building permit may indicate that a Record of Site Condition is required due to a change in land use to a more sensitive use. In such cases, a Phase One ESA will be required as a first step towards filing a Record of Site Condition
A Record of Site Condition may require completion of a Risk Assessment in accordance with O. Reg. 153/04, as amended.

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

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What other resources are there?

Environmental Protection Act, R.S.O. 1990, c. E.19

https://www.ontario.ca/laws/statute/90e19

O. Reg. 153/04: RECORDS OF SITE CONDITION - PART XV.1 OF THE ACT under *Environmental Protection Act, R.S.O. 1990, c. E.19*

https://www.ontario.ca/laws/regulation/040153

Professional Engineers of Ontario

EnviroSiteAssess2020.pdf (peo.on.ca)

Professional Geoscientists Ontario

https://www.pgo.ca/

Ministry of the Environment, Conservation and Parks– Guide for completing phase one environmental site assessments under Ontario Regulation 153/04https://www.ontario.ca/page/guide-completing-phase-one-environmental-site-assessments-under-ontario-regulation-15304

Ministry of the Environment, Conservation and Parks– Guide for completing phase two environmental site assessments under Ontario Regulation 153/04

https://www.ontario.ca/page/guide-completing-phase-two-environmental-site-assessments-under-ontario-regulation-15304

Ministry of the Environment, Conservation and Parks – Submitting a record of site condition

https://www.ontario.ca/page/submitting-record-site-condition

Notes

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A peer review may be required. The cost of the peer review will be borne by the applicant.

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Erosion & Sediment Control Plan

An Erosion & Sediment Control Plan ensures that activities due to the placing or dumping of fill, removal of topsoil and alteration of grade do not have a negative impact on the receiving storm drainage system.

Required by Legislation

TBD

Who should prepare this?

A Erosion & Sediment Control Plan must be completed by a registered professional engineer qualified in municipal engineering. All final documents must be signed and stamped by a professional engineer.

Why do we need this?

A Erosion & Sediment Control Plan is required to set out the mitigative measures for preventing negative impacts on the engineering and natural drainage system due to site alteration

How should this be prepared?

An Erosion & Sediment Control Plan should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal
- A description of the existing on-site conditions and uses as well as surrounding areas, roads, natural areas, vegetation protection zones (VPZ)buildings, parking areas, topography
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

N/A

Impacts and Mitigation Measures

Site Conditions & Procedures

- Site conditions should be outlined for the duration of the proposed development, from pre-construction through to post-construction
- Outline the temporary construction sediment and erosion control measures that will be installed prior to any site disturbance, including how they will be checked, remain in good working order until the site is stabilized, and be cleaned on a regular basis.
- Once the site has been stabilized and excess sediment removed, detail how these temporary sediment and erosion controls will be removed. All sediment deposition, catch basins, sediment forebays, sediment fences, etc., should be cleaned prior to the municipality assuming ownership (for public facilities), or prior to the owner paying the final installment to the contractor (for private facilities). All permanent sediment and erosion controls should be in good working order prior to assumption, or final payment.
- When the project involves construction activity extending beyond one construction season, it must be demonstrated which measures will be employed to stabilize the site for the over-winter period.
- A comprehensive procedure for addressing emergency scenarios and spills must be included.

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed, including tree preservation fencing
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- erosion and sediment control drawings
- arborist report, tree preservation plan showing tree protection zones (TPZ)
- a site alteration permit application

What else should we know?

- The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.
- The erosion and sediment control plan must be submitted in support of the site alteration permit application.
- When a development is located adjacent to a Regional roadway, the erosion and sediment control plan should also address what the impact of sediment in runoff from the site has on the Regional road and/or associated Regional drainage system.

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To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

Professional Engineers of Ontario

https://www.peo.on.ca/

TRCA, LSCRA, CVC - Erosion and Sediment Control Guide for Urban Construction

https://s3-ca-central-1.amazonaws.com/trcaca/app/uploads/2020/01/30145157/ESC-Guide-for-Urban-Construction_FINAL.pdf

Notes

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Functional Servicing Report

A Functional Servicing Study determines the overall impact of a large-scale land development proposal (i.e., subdivision), proposed conversion or changes of land uses and intensification, on the water and wastewater service capacities. It also determines the required improvements to the municipal servicing infrastructure, stormwater management systems, water balance etc as well as any mitigation measures to minimize negative impacts.

Required by Legislation

TBD

Who should prepare this?

A Functional Servicing Study must be completed by a registered professional engineer qualified in municipal engineering. All drawings must be stamped, signed and dated by a professional engineer, licensed in the Province of Ontario

Why do we need this?

A Functional Servicing Study is required to assist staff in determining if the existing water and wastewater services and stormwater management systems are adequate for the proposed development or if services need to be upgraded.

How should this be prepared?

A Functional Servicing Study should include sufficient details for the local municipal and Regional staff to determine the financial and infrastructure implications of servicing the proposed development. The submission should include reports, plans (e.g. engineering, drainage area, etc.), computer modeling results and design calculations relating to the designs and upgrades of municipal services The study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Minimum Investigation/Evaluation

Water Supply and Distribution

- Estimated consumption, and current capacities of local and trunk systems
- Water distribution concept plan, and phasing of development
- Net impact due to the proposed change in land use or development, and need for expansion and upgrades

Wastewater (York Region jurisdiction)

- Estimated discharge, and current capacities of local and trunk systems
- Net impact due to the proposed change in land use or development, and need for expansion and upgrades

Stormwater Drainage

- Identify and describe, pre-development and post-development conditions, grading plan, existing infrastructures and their capacity etc.
- Identify the inlets (from upstream) and outlets (to downstream) for the minor and major systems, including overland flow routes
- Identify all internal and external drainage areas under existing and future development conditions for minor and major flows
- Identify constraints and potential opportunities – quantitative, qualitative, erosion sensitivity and environmental concerns related to stormwater for both interim and ultimate development conditions
- Identify existing stormwater management requirements and/or criteria that apply specifically to the site (applicable watershed)
- Provide preliminary design calculation (including modelling) and drawings showing the size and concept location of SWM facilities for stormwater quantity, quality, erosion and water balance measures.
- Indicate the design assumptions and conceptual engineering schemes to manage both

Impacts and Mitigation Measures

- Indicate the design assumptions and conceptual engineering schemes to manage both quantity and quality of run-off
- Identify how the water balance requirement is to be achieved through the use of green infrastructure and/or Low Impact Development (LID) techniques
- Assess mitigation measures to minimize any negative impacts on the drainage system by applying appropriate on-site controls
- Demonstrate that the proposal has maximized source control measures to reduce runoff from the site and maximized conveyance control measures to infiltrate and/or treat run-off as appropriate consistent with water quantity and quality objectives
- Indicate if off-site land or works are required to implement the stormwater management proposal and comment to what extent (e.g., easements, dedication, land acquisition, etc.)
- Indicate the interim measures required for erosion, pond siltation and sedimentation, downstream works and riparian flow considerations during the construction phase;
- Indicate if other agencies have jurisdiction and if their approvals or permits are required (e.g. MTO, MECP, CAs.) and provide record of approvals
- Indicate if the proposed development requires temporary (during construction) and/or permanent dewatering and describe the impact mitigation measures, if dewatering is required.

Recommendations

Recommendations for mitigation or upgrades

Drawings and Supporting Information

Submit all plans, modeling results and calculations to support the proposals

What else should we know?

The scope of the study should be discussed with the city engineer assigned to project and or other staff or agencies as part of the pre-consultation process.

A Functional Servicing Study should be based on established municipal engineering design principles, applicable guidelines (e.g., Ministry of the Environment Conservation and Parks Guidelines), regulations and by-laws and infrastructure information available from the City and Region

The level of detail required depends on the type of application and the size of the proposed development. For example, a report in support of an application for an Official Plan and/or Zoning By-law Amendment will be more conceptual than a report in support of an application for a Draft Plan of Subdivision, which will include more details, such as where lot, block or right-of-way dimensions are approved in principle.

An Environmental Impact Study (EIS) may also be required to address the impact of development on water resources features or functions on- and off-site.

When a development is located adjacent to a regional roadway, then the functional servicing study should also address what the impact of storm drainage from the development has on the regional road and/or associated regional drainage system.

Depending on the proposed works and the proximity to the valleys, significant slopes and watercourses, the recommendations within a Functional Servicing Report may warrant additional geotechnical and slope stability studies in support of the proposed works

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To be identified by the municipality

What other resources are there?

Professional Engineers of Ontario

https://www.peo.on.ca/

Ministry of the Environment Stormwater Management Planning and Design Manual

https://www.ontario.ca/document/stormwater-management-planning-and-design-manual-0

Stormwater Management Guidelines, City of Markham

Low Impact Development (LID) Guidelines, City of Markham

Stormwater Management Guidelines, TRCA

LID Manual , TRCA.

Notes

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating the changes and whether or not the recommendations and conclusions are the same.

A peer review may be required. The cost of the peer review will be borne by the applicant.

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Geotechnical Study

A Geotechnical Study is an objective, science-based sub-surface investigation study, prepared by a qualified expert (Geotechnical Engineer/Consultant) that analyses soil and bedrock composition to determine its structural stability and its ability to accommodate development.

The report provides recommendations for construction including but not limited to earthworks, drainage works, landscaping, sewers and other below grade utilities, road and pavement design to ensure that works constructed by others are built to municipal and other applicable standards.

The study will be used to guide the design and construction of buildings, municipal roads, and services as well as to determine feasibility for infiltration of groundwater, if it is part of the proposal.

Required by Legislation

TBD

Who should prepare this?

A Geotechnical Study and drawings shall be prepared and stamped by a professional engineer licensed in the Province of Ontario and has suitable experience in the field.

Why do we need this?

A Geotechnical Study is required to provide an assessment if there may be significant challenges in the conceptual designs, land requirements, detailed design, and construction stages of a development and to supplement Stormwater Management Reports.

How should this be prepared?

A Geotechnical Study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
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Proposal Description and Context

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- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Identification of subsurface conditions including:

- Geologic setting
- Soil, bedrock (if required), and groundwater characteristics
- Locations of investigation on site and servicing plans
- Factors of safety, feasibility and risk assessment

Impacts and Mitigation Measures

- Discuss the suitability of the site's soils for the proposed development and its planned structures, proposed municipal roadways and infrastructure or grading alterations
- Provide a rationale for any recommendations of soil excavation, importing of soil materials, trenching, or backfilling
- Identify recommended construction methods and materials, including those related to backfilling and the placement of fill materials
- Provide recommendations on foundation design and construction based on the site's subsurface conditions
- Identify any concerns or recommendations for the site's drainage, considering pre, during, and post construction conditions
- Mitigation measures and monitoring programs where necessary
- Recommendations regarding below grade watertight structure(s) and/or requirement of PWDS Environmental Compliance Approval (ECA) from Ministry of Environment and Climate Change (MOECC) where applicable

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Concept Plans
- Location and Context Maps

What else should we know?

- The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.
- Geotechnical Studies are required for the design and construction of municipal roads and all developments
- The detailed design of any infiltration facilities will be based on site specific percolation tests
- The number of tests will be dependent on the size of the facility and the different types of soils conditions found within the proposed facility footprint zone of influence.
- Additional studies such as Slope Stability studies or investigations may be required if the proposed work involves or is influenced by the existing presence or proposed construction of a slope or watercourse. If the proposed work is within areas regulated by Conservation Authorities Slope Stability studies must also meet Conservation Authority geotechnical engineering and design submission requirements for slope stability studies.
- In addition to a Geotechnical Study a Hydrological Review is also required.

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What other resources are there?

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https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

TRCA Geotechnical Engineering and Design Submission Requirements
https://trca.on.ca/dotAsset/40047.pdf

TRCA Regulation Area Search Tool

https://trca.ca/planning-permits/regulated-area-search-v3/

Notes

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Hydrogeological Report

A Hydrogeological Report is a review of the subsurface hydrogeological review to identify development suitability and constraints.

Required by Legislation

TBD

Who should prepare this?

A Hydrogeological Report must be completed by a licensed, professional geoscientist or exempted engineer as set out in the Professional Geoscientist Act of Ontario and Professional Engineers of Ontario. All reports and drawings must be stamped, signed and dated by a qualified professional, licensed in the Province of Ontario.

Why do we need this?

A Hydrogeological Report is required to assess matters such as: groundwater infiltration and recharge, groundwater discharge and baseflow, groundwater elevations and flow paths, water quality and temperature, cumulative watershed impacts, temporary and/or permanent dewatering if required, coldwater fisheries supported by groundwater discharge, and impacts to the municipal drinking water sources.

How should this be prepared?

The review area shall encompass the land area covering the largest possible zone of influence that could result from the proposed groundwater taking. A Hydrogeological Report should at a minimum contain

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- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

- Existing Regional and Local Geology Hydrogeology
- Description of Topography and Drainage, physiography, surficial and bedrock geology and soils
- Test pits/boreholes
- Monitoring Wells

- Single well response tests or pump test(s)
- Private Well Survey
- Hydrostratigraphy/Hydrogeology: Aquifer properties, groundwater levels (including areas of flowing artesian conditions, groundwater flow direction(s)
- Pre-development groundwater quality
- Hydrostratigraphy/Hydrogeology: Aquifer properties, groundwater levels, groundwater flow direction and hydraulic conductivity
- Description of surface water features and functions
- Water Taking Permit Details: Water Water quality test results, in compliance with City's Sewer Use By-law, D-5-5 (Water Supply)
- Source Water Protection: Wellhead Protection Areas, Transport Pathways, Significant Drinking Water Threats, Existing Conditions/Issues
- Ecologically Significant Groundwater Recharge Areas

Impact and Potential Short/Long Term Impact Assessment

- Potential impacts to groundwater levels/groundwater flow
    - Seasonally/Historically high groundwater levels
    - Four season monitoring
- Surface water System, Other groundwater users, and land stability
- Potential impacts to groundwater discharge (baseflow)
- Post-development water balance with and without mitigation
- Post-development groundwater quality
- Groundwater Discharge (Baseflow)
- Water Balance • Groundwater Quality
- D-5-4 (Onsite Sewage Systems) • Source Water Protection: Wellhead Protection Areas, Creation of a Transport Pathway, Significant Drinking Water Threats, Existing Conditions/Issues
- Quantity and Quality of an aquifer used for the supply of drinking water
- Temporary and Permanent Dewatering if required
- Contaminant Migration Flowing Conditions

Mitigation measures

- Maintenance of Infiltration/Recharge
- Maintenance Groundwater Quality
- Monitoring Program
- Contingency Plans
- Temporary dewatering needs
- Elimination of permanent dewatering needs
- Under some circumstances, it may be possible that a plan for pre treating water before discharge in the storm sewer system may be required

Proposed Mitigation Measures and Monitoring Plan

If it has been determined that there will be a negative impact to the natural environment, City's sewage works, or the land stability, as a result of groundwater taking and discharging, the Review shall identify the following:

- The extent of the negative impact.
- Details of the existing or pre-construction state of all the infrastructure, City sewage works and natural environment within the affected zone.
- The proposed mitigation and monitoring plan.

if any potential settlement due to dewatering activities is identified, the Applicant will be required to submit a pre-construction survey (including photos) and CCTV of any municipal infrastructure identified in the hydrogeology report as potentially susceptible to settlement due to the dewatering activities.

If a proposed mitigation plan is recommended, subsequently, a follow-up report is required confirming that the affected zone has been returned to its pre-development condition prior to the groundwater taking and discharging.

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

The study area should include the land surface area covering the largest possible area of influence that could result from the proposed taking. This may include potential influences to water level, flow direction and water quality.

The level of detail required in the hydrogeological study is normally expected to be commensurate with the level of risk posed by the taking, and level of uncertainty of the available information.

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What other resources are there?

Professional Engineers of Ontario

https://www.peo.on.ca/

Professional Geoscientists Ontario

https://www.pgo.ca/home

Hydrogeological Assessment Submissions: Conservation Authority Guidelines for Development Applications (June, 2013)

https://www.lsrca.on.ca/Shared%20Documents/permits/hydrogeological%20_guidelines.pdf?pdf=Hydrogeological-Guidelines

https://trcaca.s3.ca-central-1.amazonaws.com/app/uploads/2021/10/20103017/SWM-Criteria-2012.pdf

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Illumination Study (Draft August 2021)

An Illumination Study demonstrates that a proposed development will not have any negative impact on adjacent parcels and roadways in terms of lighting and demonstrates compliance with Dark Sky Policies.

An Illumination Study comprises a lighting plan, which demonstrates the location, height, and type of lighting fixtures on the site and proposed buildings, including the location of electrical supply, and a photometric plan, which demonstrates the lighting fixture locations and illumination levels.

Required by Legislation

TBD

Who should prepare this?

An Illumination Study must be completed by an engineer qualified in exterior, roadway, and parking lot lighting. All reports and drawings must be stamped, signed, and dated by a qualified professional, licensed in the Province of Ontario.

Why do we need this?

An Illumination Study is required to reduce lighting pollution within the municipality and to ensure lighting does not negatively impact surrounding properties.

How should this be prepared?

A Illumination Study should at a minimum contain

Introduction

- Address of the property
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- Author name, title, qualifications, company name and appropriate stamp
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- Purpose of the study
- Location and context map

Proposal Description and Context

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Investigation/Evaluation

Lighting Plan:

- The location of all existing and proposed exterior lighting fixtures
- The mounting height of all existing and proposed fixtures (from adjacent grade to underside of the fixture)
- The site areas and/or building elements intended to be illuminated
- That the lighting fixtures, electrical conduit, and areas to be illuminated do not conflict with existing or proposed vegetation
- Notations that all exterior lighting fixtures are full cut-off to direct illumination downward and dark sky compliant to reduce light pollution, sky glare, and light trespass onto neighbouring properties

- Manufacturer's data demonstrating the specifications for all proposed lighting fixtures, including the photometric data, designation as IESNA "full cut-off" fixtures, and other descriptive information related to the fixtures

Photometric Plan:

- Provide all illumination levels in lux
- Demonstrate illumination levels of 0.0 lux measured at all property lines
- Provide readings that extend 6.0m beyond the property lines of the subject site

Impacts and Mitigation Measures

N/A

Recommendations

N/A

Drawings and Supporting Information

See above requirements

What else should we know?

The scope of the study should be discussed with the community planner.

The information on the lighting plan must be coordinated with all other required submission materials and drawings and must follow the standards as outlined in the Illuminating Engineering Society (IES) Standards.

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What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

International Dark-Sky Association

https://www.darksky.org/

Notes

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Noise and Vibration Study

A Noise and Vibration Study determines the projected sound and vibration exposures for a proposed development both from and to adjacent uses, for stationary and transportation related noise sources, and any mitigation measures needed.

Required by Legislation

TBD

Who should prepare this?

A Noise and Vibration Study must be completed by a registered professional engineer qualified in acoustical engineering and experienced in the preparation of noise and vibration studies.

Why do we need this?

A Noise and Vibration Study is required to assess the compatibility and/or potential impacts from a proposed development. It should also ensure that industry is able to operate and maintain compliance with regulatory approvals.

How should this be prepared?

A Noise and Vibration Study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, , specified receptor location(s), proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

- Identification of the noise source(s)

Noise Impact Study

- Description of the sound level guidelines/standards applied (methodology and approaches)
- Identification of both Transportation and Stationary noise source(s), all the assumptions related to the stationary noise sources should be clearly documented in the report.
- Data collection (e.g. ultimate AADT, truck percentage, reference sound power data, noise measurement, etc.)
- Receptor selection process
- Noise impact assessment (including low frequency noise impacts)
- Unmitigated and mitigated noise level forecasts (e.g. tables showing ultimate road traffic and predicted unmitigated sound energy exposures outdoors)
- The report must be stamped, dated, and signed by a Professional Engineer.

Vibration Impact Study (if applicable)

- Methodology and approaches
- Identification of the vibration sources
- Description of the vibration measurement procedure and criteria, as well as the equipment used for the vibration measurement
- Receptor selection process
- Measured/predicted vibration level
- The report must be stamped, dated, and signed by a Professional Engineer.

Impacts and Mitigation Measures

- Indoors: architectural requirements, ventilation requirements
- Outdoors: at source requirements, sound barriers (i.e. description and site plan with noise mitigation)
- Warning clauses
- Vibration mitigation requirement

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Base Noise Level Calculations (Noise Source Data)
- STC calculations
- Ministry of Environment Noise Guidelines
- Sample Sound Exposure Calculation (depending on the needs of the Municipality)
- Field data for vibration measurement data

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

A noise and vibration study (or environmental noise analysis) should be based on the applicable guidelines established by the Association of Professional Engineers of Ontario, the Ministry of the Environment, CNR, Go Transit (Metrolinx), York Region, Municipal Engineering Design Standards and Municipal By-laws.

Input assumptions to a noise model relating to future traffic flows should be based upon a review of the long-term forecasts contained in any municipal -wide or area-specific transportation studies.

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What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

Note: The following list of technical references needs to be validated. It has been suggested that NPC 300 replaces the MECP documents that are identified

Ministry of the Environment - Noise Assessment Criteria in Land Use Planning, Publication LU-131, October 1997:

http://www.ene.gov.on.ca/envision/gp/3372e.pdf

Ministry of the Environment - Annex to Publication LU-131, Noise Assessment Criteria in Land Use Planning, October 1997:

http://www.ene.gov.on.ca/envision/gp/337201e.pdf

Ministry of the Environment - Noise Assessment Criteria in Land Use Planning: Requirements, Procedures and Implementation, 1997:

http://www.ene.gov.on.ca/envision/gp/3517e.pdf

- technical details pertinent to MOE guideline LU-131

Ministry of the Environment - Sound Levels due to Road Traffic, Publication NPC-206, October 1995:

http://www.ene.gov.on.ca/envision/gp/3407e.pdf

Ministry of the Environment - Sound Level Limits for Stationary Sources in Class 1 and 2 Areas (Urban), Publication NPC-205, October 1995:

http://www.ene.gov.on.ca/envision/gp/3406e.pdf

National Research Council of Canada - Building Practice Note No. 56: Controlling Sound Transmission into Buildings, September 1985:

http://www.nrc-cnrc.gc.ca/obj/irc/doc/pubs/bpn/56_e.pdf

FCM Guidelines for New development in proximity to Railway Operations (May 2013), 2013_05_29_Guidelines_NewDevelopment_E.pdf(wpengine.com);

MECP D1-6 series guidelines; and Regulation 419/05

Notes

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A peer review may be required. The cost of the peer review will be borne by the applicant.

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Parking Study

A Parking Study outlines a proposed development's overall parking concept and the associated issues. The study should estimate the parking demand generated by a proposed development and determine the number of on-site parking spaces that should be provided, recognizing the parking policies, site constraints, and local conditions. Additionally, a parking strategy could be developed to identify how the parking demands for the project can be satisfied.

The study can also be used to support a parking requirement reduction by justifying that the reduced parking supply can meet the projected demand or by adopting transportation demand management strategies.

Required by Legislation

TBD

Who should prepare this?

A Parking Study must be completed by a qualified transportation consultant with expertise in parking. The report must be stamped, dated, and signed by a Professional Engineer or Registered Professional Planner (RPP).

Why do we need this?

A Parking Study is required to

- Determine the appropriate parking requirements for a proposed development (general, accessible, small vehicle, electric vehicle, etc.) and identify any surplus/deficiency
- Justify any deviation between the proposed parking supply and the parking requirements (number and size of parking spaces) of the applicable Zoning By-law
- Ensure that the parking requirements are adequate for each phase of development including the ultimate development scenario
- Explore alternative strategies to satisfy the parking requirements of the development (i.e. shared parking opportunities, payment-in-lieu, off-site parking, transportation demand management, etc.)
- To ensure a balance of vegetation and hard surfaces, including providing sufficient space and soil volumes for tree planting, and to reduce heat island effects.

How should this be prepared?

A Parking Study should be based on established policies and parking rates and supplemented by available local survey data. A parking study should recognize the general principle that the parking demand generated by a proposed development should be accommodated on-site and not rely on on-street parking or off-street parking facilities to satisfy the demand. This work may include provisions for shared parking facilities.

A Parking Study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner’s contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas

- Concept Plan for the development including building location, parking, access (vehicular, cycling and pedestrian) and circulation, amenity areas, landscaping, grading and natural features and any natural hazards
- The Zoning of the site
- Zoning by-law parking requirements, as well as recommended parking requirements from other City wide parking studies.
- Any previous parking reductions granted
- Parking required for the proposal broken down by land use. For residential developments, the number of vacant units, unit type (1-bedroom, 2 bedroom, etc.) and the number of parking spaces for the residents and visitors
- Accessible parking requirements and the number of accessible parking spaces proposed
- Inventory of legal the existing parking and off site parking agreements
- Tenant listing – unit number, tenant/business name (identify those that are vacant or unoccupied, Gross Floor area (GFA)m2, and hours of operation
- For vacant units, identify future tenants and/or proposed uses. . If future tenants are unknown, a worst case scenario should be assumed for the parking assessment (in terms of projected parking demand).
- Location of nearest transit facilities and other existing TDM measures

Investigation/Evaluation

Zoning By-law Assessment

- Compare the proposed parking supply to the governing zoning by-law and identify any deficiencies.

Parking Survey

- The parking survey will determine the parking demand for a particular use. It involves a count of the number of vehicles on the site at regular intervals over a number of days.
    - Identify the days and times the survey was completed
    - Identify the intervals establish to collect the observed parking demand and the weather conditions
    - Identify any assumptions

Parking Survey Results

- The parking survey will estimate the parking demand for a particular use. It involves a count of the number of vehicles on the site at regular intervals over a number of days. At a minimum, surveys shall be completed hourly during the proposed development's period of peak parking demand (ex: offices are anticipated to peak during weekday business hours). Surveys may be completed at proxy sites similar to the proposed development in terms of land use and context.
    - Identify the days and times the survey was completed
    - Identify the intervals establish to collect the observed parking demand and the weather conditions
    - Divide parking demand into the types of vehicles (general, accessible, electric, small vehicle, etc.)

- Identify any assumptionsIf the surveyed site consists of multiple land uses, the consultant should take the best effort to separate the observed parking demand by different land uses to establish the parking rates (e.g. residential rate vs. retail rate).
- In the event that parking survey cannot be done, the consultant should consider using historical surveyed data from other proxy sites, as well as the parking ratios from the ITE Parking Generation manual for the assessment.

Impacts and Mitigation Measures

- Outline any other considerations with regards to parking requirements such as accessibility, transit infrastructure, and Transportation Demand Management (TDM) measures
- Summarize the results of the parking analysis and the recommended parking requirements of the proposed development

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- The study should be presented in a written report format together with a plan component.
- The results should also be presented in a spreadsheet format in the appendix.

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

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To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

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What other resources are there?

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Professional Engineers of Ontario

https://www.peo.on.ca/

Notes

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Planning Justification Reports and Letters

A planning justification report provides information to understand the proposed development; to demonstrate how it is consistent or conforms to applicable provincial, regional and municipal requirements and the planning rationale for a proposed development. This document is intended to help the applicant organize and substantiate the application and to assist staff in the review of the proposal.

Depending on the complexity of the application, the information requirements may be addressed in a letter format or a more comprehensive report.

Required by Legislation

TBD

Who should prepare this?

A planning justification report is prepared and signed by an independent Registered Professional Planner (RPP).

Why do we need this?

The planning justification report or letter is required to

- Provide a clear understanding of the proposal
- Highlight information specific or particular to the proposal (i.e., special history or circumstances)
- Demonstrate good planning and how the proposal is consistent with the Provincial Policy Statements; conforms to Provincial Plans, the York Regional Official Plan, the local area Official Plan and any other guidelines or requirements

How should this be prepared?

A planning justification report should at a minimum contain

Introduction

- Address of the subject property
- General site location of the subject property and context map
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposal
- Overview of the study area
- Purpose of the study
- Listing of documents relied upon to prepare the Planning Justification report (i.e. studies undertaken by other disciplines such as a natural heritage evaluation, archaeological study, functional services study, etc.
- How the PJR addresses matters arising from the Mandatory Consultation phase

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, FSI, parking areas, access points, location of amenity areas, proposed phasing)
- In the case of a Regional or Local Official Plan Amendment(s), it is important to provide a clear justification for why the amendment to the Plan(s) is required at this time, given that these plans are reviewed on a regular basis with the intention of updating them to conform with/be consistent with Provincial policies and regulations. As such, a thorough explanation is required with a clear demonstration as to how the proposed Official Plan will benefit the community wherein the amendment would apply, the municipality and the Region
- Planning history of the site, such as previous approvals, legislative references, Ontario Land Tribunal history, relevant authorities (i.e., site plan agreements, site-specific zoning by-law and variances) including copies of relevant documents

- Process step/approvals required (i.e. zoning, site plan, consent, condominium)
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- A list detailing the potential amendments to the Official Plan and/or Zoning By-law, or a draft Official Plan amendment and/or Zoning By-law amendment in the municipality's format, if applicable
- Concept/Site plan for the development including building location, parking, access, amenity areas, grading, natural features and hazards
- A description of the location and existing condition of the subject lands including buildings, structures, any natural features, heritage resources, potential for contamination or site constraints
- A description of the surrounding land uses. If used for a business, state the name and the nature of the business and any significant features such as: roads, natural features, buildings and parking areas
- Other concurrent approvals being sought, planning applications, permits

Investigation/Evaluation

- How the proposal is consistent with the Provincial Policy Statement (PPS), and conforms to all Provincial Plans and Planning Act considerations
- How it meets relevant Regional and local Official Plan policies including discussion as to how and why each is addressed by the proposal or identify where the proposal does not comply with Regional and local Official Plan policies and why the proposed amendments are necessary, if applicable
- Overview of relevant Official Plan and Zoning By-law information, areas of compliance and non-compliance and why any proposed amendments are necessary
- Discussion of how the proposal will address any other relevant municipal planning studies or guidelines
- Where appropriate the investigation/evaluation should reference related studies prepared in support the development application in order to provide a fulsome/comprehensive analysis of the application.

Impacts and Mitigation Measures

- Analysis and opinion as to why the proposal is considered appropriate, including issues of impact and compatibility

Recommendations

- Summary and conclusions of the supporting studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Provide an outline of the supporting studies submitted (i.e., traffic studies, environmental, urban design briefs)

Community Engagement

- Provide a summary of any formal or informal community meetings held prior to the submission of the application and the feedback received.
- Provide a summary of any additional engagement that is planned as part of the proposal

A planning justification letter should contain:

- A description of the proposal, overview, major statistics (i.e., height, density, parking), relevant phasing issues, site and contextual considerations
- A site description and surrounding land uses/context/built form
- The site's planning history such as previous approvals, legislative references, Ontario Land Tribunal history, relevant authorities (i.e., site plan agreements, site-specific zoning by-law, heritage designation by-laws), severance and minor variances currently or recently in process, with copies of relevant documents
- Any other approvals required, e.g., conservation authority permit

Special considerations for plans of condominiums

In addition, the planning justification letter for draft plan of condominium applications may provide a description of the type of application (i.e., leasehold, common elements, phased, vacant land, standard) and on any related planning approval process or on any unusual circumstances (i.e., strata plan). The letter should identify whether the plan of condominium is consistent with as the approved site plan or if there have been any changes, what those changes are and why. If there was no previous planning process including site plan approval, the letter should explain the circumstances (i.e., conversion of rental).

What else should we know?

The scope of the study should be discussed with the municipal and/or local municipal planning staff and or other staff or agencies as part of the consultation process.

It is important that the study not be finalized until the results of all other studies are completed such , but not limited to, as Environmental Impact Study, Environmental Site Assessment, Traffic, Cultural Heritage, Urban Design Briefs any hazard related studies, servicing, and grading.

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To be identified by the municipality

What other resources are there?

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https://ontarioplanners.ca/hire-an-rpp

Notes

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A peer review may be required. The cost of the peer review will be borne by the applicant.

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Retail and Service Needs Study

A Retail and Service Needs Study is used to examine the market demand and potential impacts of the proposed development.

Required by Legislation

TBD

Who should prepare this?

A Retail and Service Needs Study must be completed and signed by a qualified market consultant.

Why do we need this?

A Retail and Service Needs Study is required to demonstrate the demand for the proposed commercial development, and to evaluate its anticipated impact on existing or planned commercial areas.

How should this be prepared?

A Retail and Service Needs Study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

- An introduction of the study approach and methods, with a review of background, issues, objectives, assumptions and rationale
- A review of the trade area and surroundings, evaluate the site location, size and use, determine the study area and its form and function and assess the market competition
- An inventory of retail space and site suitability, with a customer and/or license plate survey (if the vehicles cross municipal boundaries) and an inventory of competitive space
- A forecast of population levels across the municipality
- An analysis of the feasibility for additional retail/commercial space, the competition, with a projection of market growth and potential

Impacts and Mitigation Measures

- A demonstration of market demand and impact analysis

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

See above for location map, concept plans and study area

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

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Stormwater Management Report

The objective of a Stormwater Management (SWM) Report is to evaluate the effects of a proposed development on the stormwater and drainage system, and to recommend how to manage rainwater/snowmelt for the proposed development, consistent with the municipal requirements and those of the applicable conservation authority, provincial and federal regulations.

It provides staff with a basis on which to assess the increased demands on municipal infrastructure posed by the development and the need for future study requirements such as detailed designs. The study recommends improvements to the municipal infrastructure and mitigative measures to reduce erosion, risk of flooding and maintain water quality in receiving stormwater systems. The Stormwater Management Report provides detailed design calculations/modelling and drawings for Stormwater infrastructure identified within the Functional Servicing Report and/or the Master Environmental Servicing Plan

Required by Legislation

TBD

Who should prepare this?

The Stormwater Management (SWM) Report shall be prepared by a registered professional engineer qualified in civil/water resources engineering. All drawings must be stamped, signed and dated by a professional engineer, licensed in the Province of Ontario

Why do we need this?

- To identify the quality and quantity impacts of the change in stormwater runoff on existing infrastructure and watercourses due to a proposed development.
- To determine the requirement of new infrastructures and/or improvements to existing municipal servicing infrastructure required to support the proposed level of development, where applicable
- To determine mitigation measures to minimize any negative impacts on the drainage system
- To identify opportunities for enhancement of stormwater management facilities and features in redevelopment sites
- If conducted in an area with an existing MESP, to further develop the strategy established in the MESP and confirm the viability of the SWM mitigation plan and targets.

How should this be prepared?

A Stormwater Management (SWM) Report should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Reference background studies/reports (watershed, subwatershed study, MESP, FSR, etc.)
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, , imperviousness ratio, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas, , minor and major drainage systems, SWM facilities

- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards, proposed minor and major drainage system, location of SWM facilities.
- computer modelling and calculations required to achieve the previously established targets are to be included.

Investigation/Evaluation

- Identify with a map existing contours and pre-development catchments including external contributing area
- Proposed grading/contours and post development catchments area
- Identify flood plain limits of all watercourses and update, if necessary, based on updated topographic mapping.
- Identify pre-development and post-development conditions, etc.
- Identify the existing and proposed inlets (from upstream) and outlets (to downstream) for the minor and major systems, including overland flow routes
- Identify all internal and external drainage areas under existing and future development conditions for minor and major flows
- Identify constraints and potential opportunities – quantitative, qualitative, erosion sensitivity and environmental concerns related to stormwater for both interim and ultimate development conditions
- Identify existing stormwater management requirements and/or criteria that apply specifically to the site (applicable watershed watershed and Local drainage constraints)

Impacts and Mitigation Measures

- Indicate the design assumptions and engineering schemes to manage both quantity and quality of run-off
- Identify how the water balance requirement is to be achieved through the use of green infrastructure and/or Low Impact Development (LID) techniques
- Assess mitigation measures to minimize any negative impacts on the drainage system by applying appropriate on-site controls
- Demonstrate that the proposal has maximized source control measures to reduce runoff from the site and maximized conveyance control measures to infiltrate and/or treat run-off as appropriate consistent with water quantity and quality objectives
- Indicate if off-site land or works are required to implement the stormwater management proposal and comment to what extent (e.g., easements, dedication, land acquisition, etc.)
- Indicate the interim measures required for erosion, pond siltation and sedimentation, downstream works and riparian flow considerations during the construction phase
- SWM report needs to identify if the proposed SWM facilities require any kind of performance monitoring. An Operation and Maintenance manual should also be provided for the proposed SWM facilities.
-

Indicate if other agencies have jurisdiction and if their approvals or permits are required (e.g., MTO, MECP, Conservation Authority etc.) and provide record of approvals

Recommendations

Recommendations for mitigation or upgrades

Recommendations for detailed design and drawings of SWM infrastructures required to support the proposed development identified in higher level studies (such as MESP, FSR).

Detailed design and drawings of SWM facilities, including both major &minor systems, water balance measures (LIDs), their locations and sizes, 5yr and 100 year HGL calculation (to confirm no surcharge in sewer and to confirm the basement elevation is minimum 0.5m above the 100yr HGL), etc.

The report shall include supporting design calculations and required hydrology and hydraulic modelling files.

Drawings and Supporting Information

Submit all plans, all appropriate reports, plans, computer modeling results and design calculations relating to how storm run-off is to be managed in terms of stormwater quantity control (flood control), quality control, erosion & sediment control and water balance..

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

The level of detail for the Stormwater Management Report depends on the type and scope of application, the size of the development and the types of stormwater management schemes proposed. For example, a report for a Plan of Subdivision will typically be more complex than a report in support of a Site Plan Control application.

A Stormwater Management Report must include the basic quantity and quality assumptions upon which the report is based, and all appropriate functional plans of infrastructure elements for major and minor flow, which could have an impact on the layout of the Plan of Subdivision or site and building design.

These infrastructure elements may include stormwater management facilities, all water resources features and functions (i.e., watercourses, riparian areas, recharge/discharge areas), existing overland flow routes, surface features (i.e., top of bank of valleys) and existing infrastructure (i.e., water and wastewater infrastructure and underground utilities).

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To be identified by the municipality

What other resources are there?

Professional Engineers of Ontario

https://www.peo.on.ca/

Ministry of the Environment Stormwater Management Planning and Design Manual

https://www.ontario.ca/document/stormwater-management-planning-and-design-manual-0

Notes

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Sun/Shadow Analysis

A Sun/Shadow Analysis is a technical document that provides a visual model and written description of the impact of shadows cast by a proposed development on residential areas, neighbouring streets, parks and open space, (including natural areas), privately managed publicly accessible spaces and other properties.

These studies are done to evaluate the impact of shadows at various times of day, through the year.

Required by Legislation

TBD

Who should prepare this?

A Sun/Shadow Analysis must be completed by a Registered Architect, Professional Engineer (P.Eng), Registered Professional Planner (RPP), or Registered Landscape Architect.

Why do we need this?

A Sun/Shadow Analysis is required to demonstrate the location, massing, vertical and horizontal articulations, and height of a proposed building.

The objective is to maintain quality, comfortable and inviting public spaces and pedestrian environments by demonstrating that a development will not cause undue shade on the subject lands, and on the surrounding context, including building facades, private and public outdoor amenity and open spaces, parkland, school yards and buildings, sidewalks and other components of the public realm.

How should this be prepared?

A Sun/Shadow Analysis be provided in the following format:

Introduction

- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Location and context map
- A letter summarizing the study and the sun/shadow impacts of the development. Images of sun/shadow tests using models, either real or digital, that clearly indicate the development site, its boundary, the foot print and mass of buildings within the test site, any streets, public parks and accessible open spaces. Images of the sun and shadow situation for the existing context and with the proposal (a single page or pages side by side are preferred as this will assist in understanding the impacts).Digital (or paper) copies of the study for distribution and review by appropriate agencies.
- One digital copy of the development massing model.
- Large mounted versions of critical times or power point images may be requested for public meetings.

Investigation/Evaluation

The applicant may be requested to submit a proposed and final shadow study. Sun/shadow testing of alternative building massing may be required during the application review to assist in making decisions about how to best achieve Council's goals regarding sun/shadow impacts. When the massing of the application has been agreed to, a final Sun/Shadow Study will be prepared to the following standards:

The Model

A typical model will include

- Development site and property boundaries
- Building footprint and mass within the site
- All streets, blocks, parks and open spaces as well as buildings to a distance adequate to show the shadow impacts during requested times

Modeling will have two parts, the first showing the existing situation and the second showing the proposed development in its context. The proposed development context should include other approved but not built buildings within the model area. These should be indicated graphically as different from the proposal and the built context.

Shadow diagrams should be plotted in colour to a standard metric scale and include a bar scale on each sheet labelled in 1,2,5,10,20, 100 and 200m increments. A reference base plan should also be plotted at a metric standard scale.

“As of right” or other site specific applicable shadow conditions should be indicated clearly by a contrasting colour single-line overlay with explanatory notation provided in a printed legend (i.e., red for “as of right” on the subject property, yellow for approved but not yet built adjacent development).

Test Times

Sun/Shadow tests should be done for March 21 and September 21 at the following hours

- 9:18 a.m.
- 10:18 a.m.
- 11:18 a.m.
- 12:18 p.m.
- 1:18 p.m.
- 2:18 p.m.
- 3:18 p.m.
- 4:18 p.m.
- 5:18 p.m.
- 6:18 p.m.

These times allow for the measuring of hours of sunlight windows as described in the Sun, Wind and Pedestrian Comfort Bosselmann/Dunker study.

Development that proposes additional shadow impacts on parks and open space, including natural areas, will require sun/shadow tests at hourly increments for both June 21 and December 21 to provide additional information on the impacts of shadows on these important public places.

Additional times may also be requested to respond to specific site contexts.

All times are based in the Eastern Time Zone and must take into account Daylight Saving Time.

Impacts and Mitigation Measures

- A summary of the study and the sun/shadow impacts of the proposed development
- Images of sun/shadow tests using models, either real or digital, that clearly indicate the development site, its boundary, the footprint and mass of buildings within the test site, and any streets, parks and open spaces on/neighbouring this site;
- Images of the sun/shadow situation for the existing context and with the proposal (a single page or pages side by side are preferred as this will assist in understanding the impacts)
- A summary demonstrating how the proposal meets the required consecutive hours of full sunlight

- A description of any and all measures that will be taken to minimize shadow impacts by the development on neighbouring streets, parks, open spaces, natural areas, public squares and other shadow sensitive properties (such as schoolyards, cemeteries, etc)

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

See above requirements

What else should we know?

The scope of the study should be discussed with the community planner, the urban designer and or other staff or agencies as part of the pre-consultation process.

Prior to preparing the study, consultants should review any municipal Official Plan policies or guidelines with respect to sun coverage

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Ontario Association of Architects

https://oaa.on.ca/

Ontario Association of Landscape Architects

https://www.oala.ca/

Professional Engineers of Ontario

https://www.peo.on.ca/

Notes

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A peer review may be required. The cost of the peer review will be borne by the applicant.

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Transportation Demand Management Plan

A Transportation Demand Management (TDM) Plan is a report recognizing a convergence of mandates indicating policies, programs, incentives, services, facilities and infrastructure to encourage people to uses sustainable modes of transportation rather than driving alone, to generally reduce the number of trips by motor vehicle. In support of a development proposal, such a study is meant to provide measures that will mitigate the peak hour travel demand impacts and support assumptions made about modal splits, trip reductions and parking rates in the Transportation Mobility Plan of the development application.

Required by Legislation

TBD

Who should prepare this?

A Transportation Demand Management Plan must be completed by a qualified transportation consultant. The report must be stamped, dated, and signed by a Professional Engineer or Registered Professional Planner.

Why do we need this?

A Transportation Demand Management Plan is required to:

- Examine opportunities to reduce peak hour auto trips by identifying incentives to encourage trips by walking, cycling, scootering, transit, or other more sustainable modes of transportation
- Justify any considerations to reduce vehicular parking requirements

How should this be prepared?

A Transportation Demand Management Plan should be based on established transportation planning and traffic engineering principles. The Plan should also be supplemented by any available local data and experience, as well as reflect the relevant goals and policies in the local and regional Official Plans. As such, the Plan should reflect a multi-modal approach to transportation planning including cycling, walking, and transit use.

A Transportation Demand Management Plan should at a minimum contain the following

Introduction

- Property address
- Subject property general site location
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Study area overview
- Study purpose
- Location and context map

Proposal Description and Context

- A proposal description, development statistics (such as number of units, site area etc.) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, and parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Surrounding Context & Existing TDM Opportunities

- Existing conditions, study area road network traffic volumes, transit service, bicycle and pedestrian facilities, traffic intersection operations
- Identify multi-modal networks such as identifying gaps or limitations in the pedestrian and cycling networks as well as opportunities to expand transit accessibility
- Information regarding all nearby municipal, regional, and provincial roadways that will be impacted including intersections and access points for adjacent developments
- Identify proximity of proposal to transit or active transportation networks
- An evaluation of the existing travel behaviours in the area, such as mode split, common origins/destinations, etc.
- Identify planned improvements to transit and active transportation networks in the surrounding area

Impacts/ Mitigation Measures

Planning and Design

- Increased density and compact site design
- Site design elements (active frontages, reduced driveway entrances, location of parking
- Active transportation network (sidewalk, pathways, cycling facilities, road crossing locations and control, connectivity, etc.)

Walking and Cycling

- Sidewalks pathways and cycling facilities
- Connectivity to trails
- Bicycle Parking (long and short-term)
- End of trip facilities (lockers, showers, bike repair stations)
- Other

Transit

- Direct connections to transit
- Weather protected waiting areas
- Other

Parking

- Opportunities for reduced parking requirements (proximity to transit, cash-in-lieu)
- Unbundle Parking
- Paid Parking
- Carpool Parking
- Shared Parking

- EV Ready – referring to parking spots with sufficient power supply, conduit/raceway to spot, and energized outlet ready to receive EV supply equipment.
- Energy Management System (EVEMS) - referring to the system that monitors and controls EV loads to enable high levels of EV charging in MURBS/workplaces/fleet parking applications.
- Electric Vehicle Supply Equipment (EVSE) or “Charge Station” - referring to the device that facilitates charging.
- Other

Carshare/Bikeshare

- On-site carshare vehicle(s) and parking spot(s)
- On-site bikeshare (including e-bikes)

Wayfinding and Travel planning

- Wayfinding signage
- Travel planning tools
- Support for development of a School Travel Plan (if applicable)

Education/Promotion and incentives

- TDM branding
- Membership in Transportation Management Association/Smart Commute (if applicable)
- Opportunities for discounted/reduced transit passes, carshare memberships, or bikeshare memberships
- Other (eg transit trip-planning demonstration, information sessions

Recommendations

- Based on the proposed measures document the projected reductions in trips
- Recommended mitigation measures to address transportation impacts
- Proposed monitoring and evaluation of TDM measures
- Working with future tenants/end users to complete monitoring and surveys
- Summary and conclusions of the Plan and how it supports the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter
- An implementation strategy addressing who is responsible for implementing what measures and the associated costs

Drawings and Supporting Information

- Context maps, aerial photographs to help provide context for the site

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

TDM measures should be reflected in the Transportation Mobility Plan submitted in support of the development application

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What other resources are there?

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Professional Engineers of Ontario

https://www.peo.on.ca/

York Region TMP TDM Section

Notes

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Transportation Mobility Plan

A Transportation Mobility Plan is an evaluation of the effects a proposed development is expected to have on the existing transportation system including on the road, transit service, cycling and walking networks. The study is intended to recommend mitigation measures to address travel demands generated by the development, if necessary.

Required by Legislation

TBD

Who should prepare this?

A Transportation Mobility Plan should be prepared by a qualified Transportation Professional, including Professional Engineers and Registered Professional Planners. The report must be stamped, dated and signed by the Professional

Why do we need this?

A Transportation Mobility Plan is required to provide a basis for which to evaluate accommodation of non-auto transportation modes.

- Provide staff with a basis on which to assess transportation implications of the
- proposed development on the surrounding area
- Provide a basis on which to evaluate the appropriateness of the scale of the proposed development
- Provide a basis on which to evaluate safe and efficient access and traffic flow
- Provide recommendations for improvements to transportation infrastructure, service upgrades and mitigation measures to accommodate or reduce any negative impacts of a development

How should this be prepared?

A Transportation Mobility Plan should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards, proposed streets

Investigation/Evaluation

- Neighboring land uses and any proposed developments.
- Existing conditions, study area description, road network, traffic volumes, transit service, bicycle and pedestrian facilities, traffic intersection operations
- Existing model calibration if volume-to-capacity ratio is greater than one under existing condition (e.g. Saturation flow survey, gap survey, lost time adjustment survey, etc.)
- Existing model calibration if volume-to-capacity ratio is greater than one under existing condition (e.g. Saturation flow survey, gap survey, lost time adjustment survey, etc.)

- Information regarding all nearby municipal, regional, and provincial roadways that will be impacted including intersections and access points for adjacent developments
- Study assumptions: horizon years and analysis periods, traffic data collections Synchro parameters.
- Trip Generation Calculations (e.g. ITE trip rate, proxy site survey, etc.)
- Description of trip distribution and assignment (e.g. TTS for residential, marketing survey for retails)
- Future background traffic conditions: planned road network improvements, background traffic growth, background development traffic, future background intersection operations
- Future total conditions with development: vehicular trip generation, trip distribution, future total traffic intersection operations, queuing analysis, , sightline analysis, etc.

Impacts and Mitigation Measures

- Site traffic impacts of the proposed development on the surrounding road network
- Mitigation measures to address transportation impacts of the proposed development
- Preliminary design review

Recommendations

- Summary and conclusions of the study and how the development can be supported from a transportation perspective, as well as any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Concept plans
- Study Area
- Survey data, growth calculations and other technical appendices (for eg Synchro outputs, etc.).

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process.

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MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

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https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

Region of York TMP Guidelines

York Region Mobility Plan Guidelines

Notes

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Tree Inventory & Preservation Plan

A Tree Inventory & Preservation Plan is a supportive document to the Arborist report that identifies the location, species, size and condition of all trees on the site and within 6m from the area of construction including trees on neighboring sites, public lands and natural areas. . It determines the potential effects of the proposed development on existing trees and vegetation and seeks to minimize injury and loss of trees and vegetation

Required by Legislation

TBD

Who should prepare this?

The studies must be completed by a Certified Arborist who is either:

- A full member of the Ontario Professional Foresters Association (OPFA)
- A full member of the American Society of Consulting Arborists (ASCA)
- A full member of the International Society of Arboriculture (ISA)
- A Landscape Architect certified by the Ontario Association of Landscape Architects (OALA)
- A Registered Professional Forester (RPF) as defined by the Professional Foresters Act S.0. 2000
- A person with other arboriculture, forestry or ecology qualifications as approved by the Commissioner of Planning and Infrastructure
- An Arborist qualified by the Ministry of Training Colleges and Universities, Apprenticeship and Client Services Branch

Why do we need this?

A Tree Inventory & Preservation Plan are required to

- Demonstrate conformity to any applicable by-laws or Official Plan policies
- Provide staff with a basis on which to assess the proposed application with regard to tree preservation/protection issues and the overall contribution to the urban forest canopy cover

How should this be prepared?

A Tree Inventory & Preservation Plan should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- The assignment of the professional and his/her obligation throughout the entire
- project period
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- A description of the proposed development during construction and post development that may have an impact on the trees including the area of development, and units, servicing, storm water management, roads, parkland areas, recreational uses, lighting, site remediation, grading and filling for the subject and adjacent lands
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Vegetation Inventory

- A description of the site vegetation and condition at the time of inspection including the private property, municipal property and adjacent properties that may be impacted by the development
- Identification of any species at risk
- A photo log of the site showing site conditions
- A tree inventory (and other vegetation species as required on a case-by-case basis)
- Identifying all existing trees, their species, size and condition, including the tree canopy

Impacts and Mitigation Measures

- Trees proposed to be removed or retained
- A discussion of the rationale for proposed tree removal and retention
- Information to address tree protection measures for all retained trees
- A detailed tree protection methodology section to address those particular conditions where the proposed development will impact on the health and structural integrity of the trees

Recommendations

- Recommendations and methods for the containment and removal of any invasive species found
- Identification of any potential and imminent hazard tree(s)
- Proposed tree replacement/compensation and other recommendations based on municipal standards
- A cost valuation associated with trees to be removed and/or preserved may be required.

Drawings and Supporting Information

Large format plan visually displaying the information presented in the tree study and other relevant information within the report including

- Tree numbers
- Tree protection zone limits
- Diagram/details of tree protection barrier type
- Qualified Tree Consultant’s contact information
- Location of topsoil stockpiles, and the construction
- Storage and staging areas including the construction access route.
- The drip lines of vegetated areas as staked by the Conservation Authority in conjunction with municipal staff

- Species/name (scientific and common name)
- Size (DBH); and
    - Condition/health (a general rating of poor, fair, good or hazard based on the presence of cavities, decay, broken limbs/trunk, lean, root damage, form, disease, etc.)
- A recommendation as to whether each tree should be preserved or removed an the reason for reach recommendation
- The location and details of any recommended tree preservation measures to be installed, including preservation measures
- Include sediment control measures identified in any Sediment and Erosion Control plans
- Overlay on Site Plan showing proposed site alterations including existing grades, proposed grades and services

The Site Servicing and Grading Plan that may accompany some applications must include the existing and proposed grades

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or relevant environmental agencies as part of the Mandatory Consultation phase;.

Applicants should be aware of the regional and local tree bylaws, policies, and guidelines listed in this document, which are invaluable to understanding content requirements in any tree vegetation study report and tree protection plan.

No activity shall proceed on site until full evaluation of the existing vegetation and recommendations are determined and an approved plan for development has been processed or reached a satisfactory stage.

Boundary trees shall be evaluated on a site-by-site basis and may require additional written permissions from each landowner

The applicant may be requested to attend an on-site meeting with municipal and/or conservation authority staff to review existing natural features and vegetation prior to approval.

Work undertaken in regulated areas of Conservation Authorities will require a permit

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To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

International Society of Arboriculture

https://isaontario.com/

Ontario Professional Foresters Association

https://opfa.ca/

Ontario Association of Landscape Architects

https://www.oala.ca/

Toronto Region Conservation Authority Permits

https://trca.ca/planning-permits/

Lake Simcoe Region Conservation Authority Permits

https://www.lsrca.on.ca/permits

Notes

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Urban Design and Sustainability Brief

The Urban Design and Sustainability Brief is intended to support planning applications for development proposals and encourage high quality and context sensitive design responses. The Brief will illustrate the proposed development's compliance with relevant municipal policies and guidelines, as well as its fit within the existing and emerging/planned site context

Depending on the complexity of the application, the information requirements may be addressed in a high-level brief or a detailed brief.

Required by Legislation

TBD

Who should prepare this?

An Urban Design and Sustainability Brief is prepared and signed by an Urban Designer, Architect (OAA), Landscape Architect(OALA) or Professional Planner (RPP).

Why do we need this?

The Urban Design and Sustainability Brief is required to:

- Encourage high quality and context sensitive design
- To provide clear direction on how a site should be developed
- To assist staff in assessing the urban design and sustainability aspect of development applications including the design rationale for the project

How should this be prepared?

An Urban Design and Sustainability Brief should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- General street/block pattern (including block lengths)
- Built form character of surrounding area
- Views and vistas to and from the site
- Existing or planned landmarks or gateways
- Linkages to open spaces
- Other concurrent approvals being sought, planning applications, permits
- Context maps, aerial photographs to help provide context for the site
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Description of the Policy Framework and Applicable Guidelines

- Provide a summary and analysis of relevant documents, including a description of how the proposed design accounts for, and implements, the municipal Vision/Strategies as established in:
- Strategic Plan priorities
- Official Plan policies
- Urban Design Guidelines
- Transportation Master Plans, including Active Transportation
- Relevant Policy, Design Studies and/or Guideline documents for specific areas.

Design Considerations

The Design Brief should demonstrate how the design principles have guided the design of the site and optimize sustainability. Through written descriptions, plans, elevations, diagrams and/or photographs, explain how the design proposal deals with each of the following design considerations

Site Design

- Urban structure (i.e., Centre, Corridor, Development Areas, Neighbourhood etc.)
- Street and block pattern (permeability, connectivity)
- Building placement and orientation
- Transition of building mass within the neighbourhood (if applicable)
- Vehicular and pedestrian access and circulation
- Location of parking (surface or underground), driveways, ramps and/or drop-off areas
- Access to transit
- Provision for cycling facilities
- Location of servicing areas (loading, garbage, storage, utilities, etc.)
- Pedestrian safety and comfort (i.e. sun, wind, etc.)
- Integration of Green Infrastructure/Low Impact Development

Built Form

- Building height
- Transition in scale (compatibility with adjacent building forms)
- Shadow impacts
- Setbacks from adjacent properties and street
- Building step-backs

Building and Architectural Design

- Enhancing corner locations
- Roof Treatment
- Location of garage and driveways
- Location of utilities and mechanical equipment
- Location of windows and doors
- Architectural expression (base, middle, top)
- Street wall and architectural treatment at grade level (ie. podium design, access, height of first storey, level of transparency etc.)

Architectural style

- Architectural features and details
- Façade treatments
- Materials and colour palette
- Building lighting (i.e. safety, night-time illumination, etc.)
- Signage

Character

- Compatibility with and enhancing the existing neighbourhood
- Response to/interface with the existing streetscape (ie. landscaping)

Additional considerations for mid-rise and high-rise buildings

- Shaping/designing tall building floor plates
- Creating a distinct base, middle and top of buildings
- Accessibility to sunlight and sky views
- Shadow impacts on adjacent properties as well as internally within the development
- Massing articulation

Public Realm

- Streetscape elements (street trees, street lighting, street furniture including benches receptacles, flower beds, bollards etc.)
- Utility aboveground infrastructure impacts
- Public plazas (continuity of the streetscape, paving material, active pedestrian zones, outdoor patios, site furnishings, etc.)
- Semi-public spaces (front yards, shared amenity areas, gardens, courtyards)
- Public walkways and mid-block connections
- Linkages to open spaces including parks, paths, cycling routes and/or Greenway system
- Landscaping treatment and planting
- Architectural screening elements and fencing
- Landscaped buffers and parking islands
- Public art
- Gateways
- Coordinated signage/themes

Sustainability

- Intent to apply for LEED certification or other third-party certification or rating programs
- Identify if there are any provisions for sustainable features/programs related to building (e.g., energy or water conservation/efficiencies) and/or site design (i.e.. bioswales, green and/or site design (i.e.. bioswales, green roofs, solar panels, light colored or permeable paving material, xeriscaping, cycling facilities, car-share programs , electric vehicle charging)

Heritage

- Where the preservation of a heritage building is incorporated into the overall design solution, the heritage character must be evaluated and an appropriate response to the heritage attributes be provided
- Compatibility issues must be assessed in terms of the approach to incorporating heritage items into new construction

- Describe the details, materials, landscape, architectural pattern, and how these are to be reinforced, and the scale and rhythm of architecture maintained.
-

Impacts and Mitigation Measures

Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed

Recommendations

- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

- Provide an outline of the related supporting studies submitted (i.e. sun shadow study, wind study)

What else should we know?

The Community Planner will determine whether the information requirements should be a detailed for high-level brief.

The Urban Design and Sustainability Brief will incorporate findings other project studies such as the Sun-shadow study, the Wind Study, Tree Preservation, Transportation Mobility Plans, Culture Heritage Impact Studies along with any other studies or recommendations that will impact the layout of the site and the massing of the buildings and sustainability of the project

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What other resources are there?

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https://ontarioplanners.ca/hire-an-rpp

Ontario Association of Architects

https://oaa.on.ca/

Ontario Association of Landscape Architects

https://www.oala.ca/

Sustainable Technologies Evaluation Program

https://sustainabletechnologies.ca/

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In addition to these Terms of Reference, municipal departments and/or external agencies may require analysis of specific technical components that should be addressed in the study. Confirmation of additional technical requirements, and a checklist identifying detailed standards to be met, in turn may be provided. The extent of the checklist items will vary on the nature of the application and will be confirmed during the Phase 1 of the CAP process

Water Budget and Conservation Plan

A Water Budget and Conservation Plan is required to support new blocks of development or comprehensive new development within a secondary plan area.

A water budget quantifies elements of the hydrologic cycle within a watershed or subwatershed study area at an appropriate level of detail. These elements include precipitation, interception, evapotranspiration, infiltration, storage and surface runoff amounts on an annual average basis.

A water budget model can project the impacts of proposed land use or management changes on the water budget/water resource availability and to assess mitigation measures intended to maintain a given water budget state. A water budget can be used to assess if water use is sustainable, if resources are stressed, or likely to become stressed.

It is intended to support planning applications for development proposals and encourage sustainable and context sensitive design responses. The study will illustrate the proposed how it is consistent or conforms to applicable provincial, regional, municipal and/or Conservation Authority requirements.

Required by Legislation

TBD

Who should prepare this?

A Water Budget and Conservation Plan must be completed by a registered professional engineer qualified in civil/water resources engineering. All drawings must be stamped, signed, and dated by a professional engineer, licensed in the Province of Ontario.

The study team should also include qualified professionals with expertise in hydrogeology, species identification, biological, ecological and/or environmental functions and processes

Why do we need this?

Changes in hydrology can impact the quantity and quality of water reaching natural features, public and private property, habitats, water flows (flooding, drought), and erosion potential. Understanding how water moves within a water resource system is important to understanding the cumulative impacts of land use activities, such as development projects (proposed and existing). Water budgets are used to

- To set water allocation targets and recharge rates within local watersheds
- As a decision-making tool to evaluate land and water uses such as restoration and rehabilitation
- Evaluate the cumulative effects of land and water uses within watersheds
- To provide a watershed scale framework for site scale studies (e.g. evaluation of a sewage & water system plan)
- To help make informed decisions about the design of environmental monitoring programs
- To assist in setting targets for water conservation

Water Conservation Plans are required through provincial regulations plans and policies for water conservation purposes including water demand management and recycling of water.

The report will guide staff in the evaluation of the application.

How should this be prepared?

A Water Budget and Conservation Plan should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner’s contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area

- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Process steps/approvals required (i.e., zoning, draft plan of subdivison)
- Identification of Provincial, Regional, municipal, Conservation Authority Plans, policies and guidelines that are relevant to the study area
- Other concurrent approvals being sought, planning applications, permits
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Water Budget Analysis

- Quantify the components of the water balance equation, including precipitation, evapotranspiration, groundwater inflow and outflow, surface water outflow, change in storage, water withdrawals and water returns
- Characterize the groundwater and surface water flow systems by means of modelling
- Identify
    - targets to meet the water needs of the affected ecosystems
    - the availability, quantity, and quality of water sources
    - goals for public education and for water conservation
- Develop a water-use profile and forecast
- Evaluate plans for water facilities such as pumping stations and reservoirs

Impacts and Mitigation Measures

- Identify and evaluate
    - water conservation measures such as public education, improved management practices, the use of flow-restricting devices and other hardware, water reuse and recycling, and practices and technologies associated with water reuse and recycling
    - water conservation incentives such as full cost pricing
    - ways of promoting water conservation measures and water conservation incentives
- Analyze the costs and benefits of the matters described

Recommendations

- Identify water conservation measures and incentives to be incorporated

- An implementation plan for those specified measures and incentives that reconciles the demand for water with the water supply
- Proposed monitoring of the water budget and conservation plan for effectiveness.

Drawings and Supporting Information

- Study Area -map of the area under study with property boundaries of participating and non-participating landowners identified

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or agencies as part of the pre-consultation process. The planner and the local Conservation Authority will determine whether the Water Budget and Conservation Plan should be combined with the Environmental Servicing Study.

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

Professional Geoscientists Ontario

https://www.pgo.ca/

Toronto Region Conservation Authority Permits

https://trca.ca/planning-permits/

Lake Simcoe Region Conservation Authority Permits

https://www.lsrca.on.ca/permits

Notes

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating the changes and whether or not the recommendations and conclusions are the same.

A peer review may be required. The cost of the peer review will be borne by the applicant.

If the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered in complete and returned to the applicant.

About The Following Terms of Reference

These Terms of Reference were developed as a joint effort with participation by representatives from all York Region municipalities and the Region. The Terms of Reference are in widespread use across the Region, with local requirements added as prescribed by each municipality

The requirement for this study will be decided during Phase 1 (Mandatory Consultation) of the Collaborative Application Preparation (CAP) process.

If determined that this study is applicable, the study terms may vary depending on the nature of the proposal. Discussion and confirmation as to whether all criteria outlined within these Terms of Reference are appropriate for your development project, will also take place with you and in consultation with any relevant external agencies during Phase 1

In addition to these Terms of Reference, municipal departments and/or external agencies may require analysis of specific technical components that should be addressed in the study. Confirmation of additional technical requirements, and a checklist identifying detailed standards to be met, in turn may be provided. The extent of the checklist items will vary on the nature of the application and will be confirmed during the Phase 1 of the CAP process

Wind Study

A Wind Study is a technical document that provides a model and written description of the impact of winds associated with proposed development on surrounding public and private open spaces, outdoor amenities, building entrances, residential areas, neighbouring streets, parks and open space, (including natural areas), , and other properties, in addition to the existing on-site wind conditions.

Required by Legislation

TBD

Who should prepare this?

A Wind Study must be completed by a qualified microclimate professional or a certified wind tunnel specialist. All reports and drawings must be stamped and/or signed and dated by a Professional Engineer, licensed in the Province of Ontario

Why do we need this?

A Wind Study is required to predict and demonstrate the adverse impact of the proposed development and how these conditions can be mitigated through siting, orientation , massing, vertical and horizontal architectural articulations, landscape treatments and adjustment to the height and set backs of a proposed building.

The objective is to maintain quality, comfortable and inviting public spaces and pedestrian environments by demonstrating that a development will not cause undue wind conditions on the subject lands, and on the surrounding context, including building facades, private and public outdoor amenity and open spaces, parkland, school yards and buildings, sidewalks, and other components of the public realm.

How should this be prepared?

Usually, the content described under Final Wind Study will be sufficient to appropriately assess the impacts of proposed developments. However, a Preliminary Wind Study may be required for large sites, waterfront sites and/or sites where a substantial increase in height is requested.

A Wind Study should at a minimum contain

Introduction

- Address of the property
- General site location of the subject property
- Project Name (if applicable)
- Applicant and owner's contact information
- Author name, title, qualifications, company name and appropriate stamp
- Brief description of the proposed development
- Overview of the study area
- Purpose of the study
- Location and context map

Proposal Description and Context

- A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards

Investigation/Evaluation

Preliminary Wind Study

A preliminary wind study may be required for developments for large sites where a substantial increase in height is requested.. The study will be conducted by a qualified microclimate specialist to identify any design or massing features that could create pedestrian comfort concerns. Identification as to how wind data is collected is also required.

General issues to be addressed in the preliminary wind study include the following

- Height of the proposed development in relation to the height of surrounding structures
- The orientation and general massing of the development with respect to the primary wind directions
- Location and shape of specific design features that induce wind activity
- Orientation of the development with respect to sun angles
- Potential impact of wind speed increases created by the development on the surroundings
- Outline of basic mitigation features to be included in development design including base and podium conditions, canopies and tower orientation

As part of the preliminary study, a quantitative pedestrian comfort evaluation including a wind tunnel test will be undertaken. This study will include a minimum of 15 sensor locations. The focus of this initial study is to recommend appropriate mitigation measures that involve changes to the building design, massing and form. Changes to landscaping are not to be included in the initial study.

Final Wind Study

Prior to finalizing the application, some proposals may require quantitative wind testing by a certified wind tunnel specialist that meets the following criteria:

Model Scale

- The model shall be no smaller then a 1:500 representation of the proposed development and will include all buildings within a minimum of 480 m of the site, in keeping with the industry standard.

Test Configuration

Unless otherwise agreed to by the municipality, the following conditions will be evaluated

- Initial conditions defined as all existing approved development, those developments under construction and the development being proposed
- If design mitigation is necessary to increase pedestrian comfort, the mitigation measures are also to be evaluated

Development that is approved but not built for 5 years is not to be included in the test

Scope of Study

- Before the final testing is done, the test sensor locations will be approved by staff, or peer reviewed by a consultant. A draft proposal for sensor locations should be provided to the municipality for comment.
- Pedestrian comfort is to be evaluated based on wind force, thermal comfort and wind chill to evaluate the comfortable use of sidewalks and open spaces for appropriate uses including sitting, standing and walking.

- Mitigative measures should be provided for all areas that are identified as uncomfortable or severe wind situation , such as but not limited to architectural articulation or special landscape treatments.

Impacts and Mitigation Measures

- A summary of the study and wind impacts of the proposed development
- A summary demonstrating how the proposal meets acceptable wind comfort conditions
- A description of any and all measures that will be taken to minimize wind impacts by the development on neighbouring streets, parks, open spaces, natural areas, public squares and other shadow sensitive properties (such as schoolyards, cemeteries, etc)

Recommendations

- Summary and conclusions of the studies and how they support the development and any special considerations or conditions that should be imposed
- Any recommendations, or conditions that should form part of a decision on the matter

Drawings and Supporting Information

See above requirements

What else should we know?

The scope of the study should be discussed with the community planner, urban designer and or other staff or agencies as part of the pre-consultation process.

Prior to preparing the study, consultants should review any municipal Official Plan policies or guidelines with respect to wind comfort

MUNICIPALITY NAME Additional Terms

To be identified by the municipality

MUNICIPALITY NAME Study Submission Instructions

To be identified by the municipality

What other resources are there?

Ontario Professional Planners Institute (OPPI) – Hire an RPP

https://ontarioplanners.ca/hire-an-rpp

Professional Engineers of Ontario

https://www.peo.on.ca/

Ontario Association of Architects

https://oaa.on.ca/

Ontario Association of Landscape Architects

https://www.oala.ca/

Notes

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating the changes and whether or not the recommendations and conclusions are the same.

A peer review may be required. The cost of the peer review will be borne by the applicant.

If the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered in complete and returned to the applicant.